OGM.3

USER GUIDE

OGM.3

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OGM.3 OGM 3
INTRODUCTION

OGM 3 is the next generation tool for Order Guide and compliance management. OGM 3 gives you the ability to not just manage, but optimize your Order Guides. The tool provides you with real-time visibility to product availability and pricing, allowing you to properly manage product compliance.

Until OGM 3 fully encapsulates our legacy Order Guide Management tools, please utilize the following workflows:

Workflow	Change
Product Adds	Use OGM 3 to add products from a Supplier's Master Catalog to your Order Guides. Suppliers will be notified of adds via a *Daily Change Report* from DSSI.
Product Removes	Use OGM 3 to remove products from your Order Guides. Suppliers will be notified of removals via a *Daily Change Report* from DSSI.
Pricing Changes	Suppliers will continue to submit price changes the same way they did before – either with Supplies OGM or an update to the DSSI Customer Support Team.
Product Categories	Product categories mirror what each Supplier provides in their Master Catalog. While you will not be able to change those categories, you will be able to restrict by category.
Product Blocks	The OGM 3 restriction feature is the new alternative for product blocks. Restrictions are more flexible and can be self-managed in the OGM 3 tool. Keep in mind this saying, "Order Guide trumps Restriction". In other words, if you restrict a product that's on an Order Guide, that product will be visible and orderable by users.

Alerts: The Alerts button allows you to manage discontinued product and lost coverage alerts.

Audited Price: Pricing for an item that is agreed upon between the Provider and the Supplier and is fixed for a set duration, usually based upon a specific contract with the Supplier (or manufacturer).

Boost: Use the grid view option on the Add/Edit Master Item page to "boost" an item at a specific Distribution Center and override the prioritization when available.

Category Restriction: Category Restrictions prevent entire categories of products from being purchased Off Order Guide. To completely block items from being purchased, you must also remove them from your Master Order Guides.

Coverage: OGM 3 displays coverage of a Master Item across all Distribution Centers (broadline food vendors and some produce and dairy vendors) and immediately identifies product availability across all ordering locations, helping to drive consistency.

Coverage Alert: Coverage Alerts let you know when Master Items exist that don't provide full Coverage across all the locations to which you've assigned that Master Order Guide.

Delete: Use the Delete feature when you need to remove one or more Master Items from a Master Order Guide.

Dismiss: Select Dismiss to remove an item from your Discontinued Products alert page if no further action is needed.

DSSI Sage: DSSI Sage is an artificial intelligence (AI) technology that makes recommendations.

Group: Use the Group feature when you need to group "like" Master Items together.

Discontinued Product Alert: Review your Discontinued Product Alerts so you can see how items are changing across your Distribution Centers (DCs) and raise any questions with your distributor.

Item Restriction: Item Restrictions prevent individual item from being purchased Off Order. To completely block the item from being purchased, you must also remove it from your Master Order Guides.

Locations: OGM 3 allows you to assign Order Guides and Restrictions to specific locations. By default, a newly created Master Order Guide will be automatically assigned to all of your locations. Unassign Locations when you're building a Master Order Guide that only pertains to some of your communities.

Mass Change: Use Mass Change to quickly and easily ADD or REMOVE *multiple* items to *multiple* Master Order Guides!

Mass Import Report : Use the Mass Import Report to see if you had any errors with the items you added via Mass Upload.

Mass Upload: Mass Upload is great to use when centralizing your *food* Master Order Guides because you can upload *multiple* items to *multiple* Master Order Guides and prioritize them accordingly.

Master Item: Master Items can either a) have a one-to-one relationship with a product or b) consist of a list of "like" products where you want to drive coverage and availability across all your locations. Names for Master Items are not seen by end users, but the highest-priority individual items you include on them are.

Master Order Guide: A Master Order Guide is a list of items or ingredients that you can assign to your locations. Names of Master Order Guides are not seen by end users, but the highest-priority individual items you include on them are.

Non-Audited Price: Pricing for an item that may reflect a negotiated discount, but is not fixed for a set duration.

Off Order Guide: Off Order Guide items are maintained automatically by OGM 3 to be all remaining Master Catalog items not already on an Order Guide. Each Provider can configure the Off Order Guide for each Supplier to be visible or hidden, and orderable or non-orderable by DSSI users.

Order Guide: A focused subset of items available for users to purchase, selected for purchasing control and convenience.

Order Guide Download: A report that allows you to filter by Supplier, Distribution Center(s), and Master Order Guide(s).

Priority/Prioritize: Drag and drop products within a Master Item to create your list of priorities. The highest priority product with the appropriate coverage is the one that will appear to your end users on DSSI.

Resolve: Selecting the Resolve action allows you to review and manage the impact the inactivation of the item has had on your Master Item(s).

Search: Click **Search** on the main toolbar to search for active products across all your OGM 3 vendors and see which Master Order Guides they're on.

Supplier Master Catalog: When you search for items on OGM 3, you are searching the complete set of items that a Supplier sells to Senior Living customers.

Ungroup: Use the Ungroup feature when you need to ungroup "un-like" Master Items that were grouped together.

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ONBOARDING

OGM 3 ONBOARDING
TRANSITION SMOOTHLY TO OGM 3

Make transitioning to OGM® 3 a seamless process for you by using the following recommendations.

1. ATTEND AN OGM 3 TRAINING SESSION

Register for an upcoming OGM 3 training session so you can see the tool in action, learn the workflows, and get all your questions asked!

2. GET STARTED ON OGM 3

Have a new item to add to an Order Guide? Need to remove a list of products from an Order Guide? Want to restrict a category of products so users cannot order them? When you're ready to do any order guide management tasks, log in to your OGM 3 site and do it yourself!

3. GREASE THE WHEELS: KEEP YOUR OGM 3 EXPERIENCE SUCCESSFUL

When you grease the wheels of a process or system, you help things happen successfully and without problems. To make your OGM 3 experience a continued success, log in to OGM 3 on a regular basis, complete a few workflows each week, and review the resources on the Help Menu.

4. OGM 3 PRODUCT ENHANCEMENTS: STAY CURRENT WITH FUNCTIONALITY

As we add functionality to OGM 3, keep an eye out on the Help Menu for Announcements alerting you to the enhanced workflow(s). Sometimes, we'll also host short calls to show off the latest and greatest in OGM 3 and answer your questions. Join these sessions as your schedule allows or catch up on your own by watching the video recordings that we'll post to the OGM 3 Help Menu.

OGM.3 ONBOARDING
GET STARTED ON OGM 3

Below are some tasks that we think will best prepare you for your first-time use of OGM 3.

Note: If you are currently going through the process of centralizing a FOOD Order Guide, use that Master Order Guide for each one of the tasks below.

☐ **LOG IN TO YOUR OGM 3 SITE**
Log in to DSSI, click the **DSSI Manage** link under the **Tools** menu, select the **OGM 3** icon and get to work!

☐ **USE THE OGM 3 HELP MENU**
Spend a few moments getting familiar with the resources available to you on the Help Menu.

☐ **REVIEW YOUR MASTER ORDER GUIDE(S)**
Get a feel for your Master Order Guides. What are they named? How many Master Items do you have on each one? How many locations are assigned to each one? Use the links to view and/or edit the information.

☐ **EDIT MASTER ITEMS**
Get a feel for the Master Items on one of your Master Order Guides. Search for a certain product type. Do those products all belong? If not, use the **Delete** function. Do any products need to be combined into one Master Item or separated into individual Master Items? If so, use the **Group** and **Ungroup** functionality.

☐ **CREATE A MASTER ORDER GUIDE**
If you need to, create a new Master Order Guide and remember to immediately click the **Locations** link to un-assign it to all but the locations to which you want it assigned.

☐ **CREATE MASTER ITEMS**
If you need to, create a new Master Item for one of your Order Guides. If you have multiple Master Items to add, consider using the **Mass Change** feature from the main *Master Order Guide* page.

☐ **ENSURE COVERAGE AND PRIORITIZE**
Where necessary, ensure each Master Item has full **Coverage** and then **Prioritize** accordingly. Note: This is an especially important step for those of you who want to centralize your FOOD Order Guides. For further information on that process, there are several pages dedicated to centralization in this User Guide.

☐ **ADD A RESTRICTION**
Do you have a product or category of products that some communities need to order, but others do not? If so, use the **Restrictions** screen. Just remember that "Order Guide Trumps Restrictions", so to make the item or category un-orderable, you must also remove the product(s) from the appropriate Master Order Guide(s).

☐ **REVIEW YOUR ALERTS**
Go to the **Alerts** page and use the filters and sort functionality to **Dismiss** or **Resolve** each of your alerts.

☐ **GENERATE AN ORDER GUIDE DOWNLOAD REPORT**
Go to the **Reports** page and click **Generate Report**. Make your selections and once the report has been generated, click **Download** to save and view the report.

☐ **SEARCH**
Click **Search** on the navigation bar to search for a product across all of your OGM 3 Suppliers. Use the **Filters** button to filter your search results by Supplier, Brand, or even Pack Size!

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OGM®3 ONBOARDING
FOR CURRENT SUPPLIES OGM USERS

OGM® 3 continues to deliver the same value as Supplies OGM, while bringing additional significant benefits your way! For example, OGM 3 allows YOU to instantly add and remove products from your Order Guides. No more waiting, and no more creating tickets!

Here's how your existing workflows in Supplies OGM will translate to what you experience in OGM 3.

Workflow	Supplies OGM		OGM 3
Log In	Go to DSSI, click the **DSSI Manage** link under the **Tools** menu, and then click the **Supplies OGM** icon.	☐	Go to DSSI, click the **DSSI Manage** link under the **Tools** menu, and then click the **OGM 3** icon.
Get Help	In-app Help did not exist on Supplies OGM.	☐	Click the **Help** button (lower-right corner) to find up-to-date videos, PDFs, tours, and training links.
Go Home	Click the **Home** button.	☐	Click the **OGM 3** logo.
Add an Item	• Contact the vendor. • Wait for the vendor to submit the new product file in Supplies OGM. • Review and approve the new product file in Supplies OGM and code the product(s) to the appropriate GL code(s). • Have the vendor submit a request through our Customer Advocacy Team to add the appropriate description and image(s) to the item(s). • Wait for the changes in Supplies OGM to sync to DSSI. *Note: This process could have taken hours or days before your users saw the updates.*	☐	• Find the appropriate Master Order Guide and click the **Items** link. • Click the **Add** button. • Search for the item under the **Add Products** heading and click the **+Add** link for any products you want to add to the Master Item. • If you have more than one item as part of the Master Item, review the Coverage and then drag/drop to Prioritize. • Click **Add Master Item** when finished. • The product descriptions and images we have from the vendor will be automatically added to DSSI and, the GLs for items will be automatically coded based on categorization. *Note: Within minutes, the changes YOU made in OGM 3 will be visible to your users on DSSI!*
Remove Items	This functionality never existed in Supplies OGM; you had to email our Customer Advocacy Team.	☐	• Find the appropriate Master Order Guide and click the **Items** link. • Search for the Master Item, select the checkbox next to the item, and click **Delete**. *Note: Within minutes, the changes YOU made in OGM 3 will be visible to your users on DSSI!*
Push Changes to Users	Once everything was finalized between you and your vendor, changes typically took about two hours to sync to DSSI.	☐	Updates that YOU make in OGM 3 are visible to your users on DSSI within minutes!
Approve a Price Change	Review the **Product Changes Pending Your Approval** and **Approve** or **Deny** with notes.	☐	Follow the same process in Supplies OGM, which will remain a price change tool.
View Change History	• Click the **Product Changes** button. • Choose the **Change History** link.	☐	This functionality is coming soon.

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Workflow	Supplies OGM		OGM 3
Block Products	This functionality never existed in Supplies OGM; you had to email our Customer Advocacy Team.	☐	OGM 3 allows you to restrict an item OR an *entire category* from being purchased by your users. • Click **Restrictions** from the navigation bar. • Once a restriction list has been created, select either the **Items** or **Categories** link and follow the prompts on the screen. *Note: Within minutes, the changes YOU made in OGM 3 will be visible to your users on DSSI!*
Edit a GL	• Click the **Product Changes** button. • Click the **Product Files** link. • Choose the **Search for Products** link. • **Select a Supplier** from the drop-down list. • Enter the appropriate item number(s) in the **Search for Products** text box and click **Search.** • Click the **GL Group** link, **Choose a GL Group** from the drop-down list, and click **Save Changes**.	☐	Because we have your GL Map on file, the GLs for items will be automatically coded based on categorization. However, to make a change: • Go to the *Master Item Edit* page for that item and check the **Categories and GL Assignments** checkbox. • Click the blue GL Group link for the item. • Pick a new GL Group from the drop-down menu and click **Assign GL Group**.
Remove or Replace Discontinued Items	This functionality never existed in Supplies OGM; the vendor would have had to contact you, obtain your approval, and have our Customer Advocacy Team remove and/or replace the items.	☐	• Click **Alerts** from the navigation bar. • Use the **Dismiss** link to remove the notification from your view. • Use the **Resolve** link to find a comparable item to add as a replacement.
Pull Reports	Reports were never available in Supplies OGM.	☐	Click **Reports** from the navigation bar to generate and one of several reports.
Back-Up Items	This functionality never existed in Supplies OGM.	☐	The concept of a Master Item allows you to add "like" items to the same Master Item and then **Prioritize** them so that when the top priority item is no longer available, the next item in line is automatically available for your users.
Create a Unique Order Guide for a Unique Location	This functionality never existed in Supplies OGM; you only had one Order Guide per vendor for all your locations.	☐	• Click the **New** button from the Master Order Guides screen and follow the prompts to create a new Master Order Guide. • Then use the **Locations** link to unassign any locations you don't want assigned to it.
Download an Order Guide for a Location	• Click the **Product Changes** button. • Click the **Product Files** link. • Choose the **Edit Current Products** link. • **Select a Supplier** from the drop-down list. • Click **Current Products** and then **Choose File**.	☐	• Go to the **Reports** page and click **Generate Report**. • Make your selections, ensuring you pick all the Master Order Guides assigned to a location. • Once the report has been generated, click **Download** to save and view the report.

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OGM.3 ONBOARDING
FOR CURRENT FOOD OGM USERS

OGM® 3 continues to deliver the same value as Food OGM, while bringing additional significant benefits your way! For example, OGM 3 allows you to create Master Items that consist of "like" products so you can drive coverage and availability across all your locations for when products get discontinued or become unavailable.

Here's how your existing workflows in Food OGM will translate to what you experience in OGM 3.

Workflow	Food OGM		OGM 3
Log In	Go to DSSI, click the **DSSI Manage** link under the **Tools** menu, and then click the **Food OGM** icon.	☐	Go to DSSI, click the **DSSI Manage** link under the **Tools** menu, and then click the **OGM 3** icon.
Get Help	In-app Help did not exist on Food OGM.	☐	Click the **Help** button (lower-right corner) to find up-to-date videos, PDFs, tours, and training links.
Go Home	Go to the **Manage Order Guides** screen.	☐	Click the **OGM 3** logo.
Add an Item	• There were multiple ways to do this, most notably from the **Manage Products** screen. • However, regardless of the workflow, you could only search for products within <u>one</u> DC/OpCo. *Note: After completing your work in Food OGM, the changes would sync overnight to DSSI so your users could see the updates the next day. (Unless you chose to Process All Pending Changes from the Reports screen.)*	☐	• Find the appropriate Master Order Guide and click the **Items** link. • Click the **Add** button. • Search for the item, click **Add**, find other "like" items to ensure 100% Coverage, drag and drop the items to prioritize them in your preferred prioritized order, and then click **Add Master Item**. *Note: Within minutes, the changes YOU made in OGM 3 will be visible to your users on DSSI!* *As a reminder, if the first priority product is stocked and available, it would appear on DSSI. If it wasn't, then the second priority product would automatically appear. And so on and so forth.*
Remove Items	There were multiple ways to do this. You might have chosen to use the **Manage Order Guides** screen, the **Mass Updates** screen, or even the **Manage Products** screen.	☐	• Find the appropriate Master Order Guide and click the **Items** link. • Search for the Master Item, select the checkbox next to the item, and click **Delete**. *Note: Within minutes, the changes YOU made in OGM 3 will be visible to your users on DSSI!*
Mass Remove	• Go to the **Mass Updates** screen. • Follow the prompts on the screen.	☐	• Click **Mass Change** from the main screen. • Follow the prompts on the screen.
Push Changes to Users	• Go to the **Reports** screen. • Select **Pending Changes**. • Click the **Process** button. • It would then take about 15 minutes for your changes to sync to DSSI. .	☐	Updates that YOU make in OGM 3 are visible to your users on DSSI within minutes!
View Change History	• Go to the **Reports** screen. • Use the **Order Guide Change Report** or the **Product History Report**.	☐	This functionality is coming soon.

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Workflow	Food OGM		OGM 3
Block Products	There were multiple ways to do this. You might have chosen to use the **Manage Order Guides** screen, the **Mass Updates** screen, or even the **Manage Products** screen.	☐	OGM 3 allows you to restrict an item OR an *entire category* from being purchased by your users. • Click **Restrictions** from the navigation bar. • Once a restriction list has been created, select either the **Items** or **Categories** link and follow the prompts on the screen. *Note: Within minutes, the changes YOU made in OGM 3 will be visible to your users on DSSI!*
Edit a GL	• You could have used the **Manage Order Guides** screen or the **Manage Products** screen to edit a GL. • You could then assign the new GL Group to all the DCs/OpCos, or just one of them.	☐	• Go to the *Master Item Edit* page for that item and check the **Categories and GL Assignments** checkbox. • Click the blue GL Group link for the item. • Pick a new GL Group from the drop-down menu and click **Assign GL Group**.
Remove or Replace Discontinued Items	• Go to the **Manage Order Guides** screen. • Click the **Discontinued & Unavailable Products** link. • Use the **Remove** link to remove the notification from your view. • Use the **Find Replacement** link to find a comparable replacement item.	☐	• Click **Alerts** from the navigation bar. • Use the **Dismiss** link to remove the notification from your view. • Use the **Resolve** link to find a comparable item to add as a replacement on the Master Order Guide.
Pull Reports	Go to the **Reports** screen to generate a report.	☐	Click **Reports** from the navigation bar to generate and one of several reports.
Back-Up Items	This functionality never existed in Food OGM.	☐	The concept of a Master Item allows you to add "like" items to the same Master Item and then **Prioritize** them so that when the top priority item is no longer available, the next item in line is automatically available for your users to purchase.
Create a Unique Order Guide for a Unique Location	This functionality never existed in Food OGM; you could only have one Order Guide per location. *So if Location A needed 500 items and Location B needed those same 500 items plus 7 unique items, you'd have to copy the Order Guide and then essentially manage the same 500 products on two different Order Guides.*	☐	• Click the **New** button from the Master Order Guides screen and follow the prompts to create a new Master Order Guide. • Then use the **Locations** link to unassign any locations you don't want assigned to it. *Using the same example, you could assign Locations A and B to a Master Order Guide with 500 products and then only assign Location B to a Master Order Guide with 7 items on it. What's the result? Location A sees 500 products and Location B sees 507 products!*
Download an Order Guide for a Location	• Go to the **Manage Order Guides** screen. • Select the name of any Order Guide. • Use either of the **Download to Excel** links.	☐	• Go to the **Reports** page and click **Generate Report**. • Make your selections, ensuring you pick all the Master Order Guides assigned to a location. • Once the report has been generated, click **Download** to save and view the report.

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ORDER GUIDE MANAGEMENT

Because of major advances in DSSI processes, tools, automation, and efficiencies, DSSI has redefined common aspects of how catalogs and Order Guides are managed.

The definitions below describe the core components of how DSSI defines Order Guides.

TYPES OF ORDER GUIDES

- **Supplier Master Catalog:** When you search for products on OGM 3, you are searching the complete set of products that a Supplier sells to Senior Living customers. Information provided with a Master Catalog includes the status of each product (active or discontinued) and standardized product content such as descriptions, features, images, etc.
- **Order Guide:** A focused subset of products selected for purchasing control and convenience. Product selection and controls are managed by each Provider, usually with some assistance from their Supply Chain.
- **Off Order Guide:** Supplier Master Catalog products not on an Order Guide. Off Order Guide products are maintained automatically by OGM 3 to be all remaining Master Catalog products not already on an Order Guide. Each Provider can configure the Off Order Guide for each Supplier to be visible or hidden, and orderable or non-orderable by DSSI users.

GL ASSIGNMENTS – CURRENT PRODUCTS

When your Order Guide was transferred to OGM 3, all of the GL assignments by individual product were maintained.

GL ASSIGNMENTS – NEW PRODUCTS

When you add a new product to your Order Guide using OGM 3, a more efficient and sophisticated method is used to automatically assign a GL code to it, thereby eliminating work on your end!

OGM 3 will automatically assign a GL code to that new product based on that Supplier's Category / GL Group Map. If a product is added to an Order Guide with a category that isn't mapped to your GL Group Map, that product will default to your "Specials" GL.

WHAT IS A CATEGORY / GL GROUP MAP?

A Category / GL Group Map is set up at the point in time you begin using OGM 3. It is then used as a reference to automatically assign GL codes to products you add to your Order Guides. This allows you to add multiple products to your Order Guides at one time without the hassle of individually assigning a GL code for each individual product!

A Category / GL Group Map basically consists of two things: 1) A list of all a Supplier's product categories that you've used before and then 2) your in-house GL Group tied to each product category. When you add a new product to an Order Guide in OGM 3, this Category / GL Group Map will look at the category it appears in and then assign it to the appropriate GL Group, without any work needed on your end!

Here's an example of a Category / GL Group Map for the Supplier, Direct Supply, and fake customer, DMO:

CustCode	SupplierCode	Supplier	Category1	Category2	GLGroupID	GLGroupDescription	ExampleDefaultGL
DMO	DSHE	Direct Supply Equipment	Environmental	Appliances	19	Disposable Equipment	60074
DMO	DSHE	Direct Supply Equipment	Environmental	Facility Maintenance	18	Maintenance Supplies	30074
DMO	DSHE	Direct Supply Equipment	Environmental	Floor Care	31	Housekeeping Supplies	30072
DMO	DSHE	Direct Supply Equipment	Environmental	Housekeeping	31	Housekeeping Supplies	30072
DMO	DSHE	Direct Supply Equipment	Environmental	HVAC	18	Maintenance Supplies	30074
DMO	DSHE	Direct Supply Equipment	Environmental	Janitorial Supplies	31	Housekeeping Supplies	30072
DMO	DSHE	Direct Supply Equipment	Environmental	Laundry	4	Laundry equipment	20071
DMO	DSHE	Direct Supply Equipment	Environmental	Plumbing	18	Maintenance Supplies	30074
DMO	DSHE	Direct Supply Equipment	Environmental	Safety & Security	18	Maintenance Supplies	30074
DMO	DSHE	Direct Supply Equipment	Foodservice	Cooking Equipment	6	Dietary Equipment	20070
DMO	DSHE	Direct Supply Equipment	Foodservice	Dining Services	6	Dietary Equipment	20070
DMO	DSHE	Direct Supply Equipment	Foodservice	Dishroom	6	Dietary Equipment	20070
DMO	DSHE	Direct Supply Equipment	Foodservice	Food Preparation	6	Dietary Equipment	20070
DMO	DSHE	Direct Supply Equipment	Foodservice	Ice Machines & Refrigeration	6	Dietary Equipment	20070
DMO	DSHE	Direct Supply Equipment	Foodservice	Smallwares	6	Dietary Equipment	20070
DMO	DSHE	Direct Supply Equipment	Foodservice	Storage & Transport	6	Dietary Equipment	20070
DMO	DSHE	Direct Supply Equipment	Furnishings	Common Area Furniture	19	Disposable Equipment	60074
DMO	DSHE	Direct Supply Equipment	Furnishings	Dining Room Furniture	19	Disposable Equipment	60074
DMO	DSHE	Direct Supply Equipment	Furnishings	Electronics	18	Maintenance Supplies	30074
DMO	DSHE	Direct Supply Equipment	Furnishings	Flooring & Wall Protection	18	Maintenance Supplies	30074
DMO	DSHE	Direct Supply Equipment	Furnishings	Furniture	19	Disposable Equipment	60074
DMO	DSHE	Direct Supply Equipment	Furnishings	Office Furniture	19	Disposable Equipment	60074
DMO	DSHE	Direct Supply Equipment	Furnishings	Resident Room Furniture	19	Disposable Equipment	60074

GL ASSIGNMENTS – MAKING CHANGES

To view or make changes to your Category / GL Group Map go to the **Support Center** link in DSSI to submit your request. Also use the **Support Center** link in DSSI if you need to change the GL assignment of a specific product.

OGM.3 ORDER GUIDE MANAGEMENT
ORDER GUIDE MANAGEMENT APPROACHES

Here are five approaches to best configure your DSSI site for maximum results. They range from having the least amount of control to the most amount of control. Use these approaches to drive **On System** compliance as well as **On Order Guide** compliance; and then layer on additional controls to increase savings. Use this guide to determine your current approach; choose your desired future approach for each vendor; and map out how you'll get there.

ORDER GUIDE MANAGEMENT APPROACHES

#1 – OPEN OFF ORDER GUIDE
CREATE ORDER GUIDES IN OGM 3 AND MAKE ALL OTHER CATALOG PRODUCTS AVAILABLE OFF ORDER GUIDE

- **PROS:** Higher On System Compliance, Order Guide Steers Purchases, Little-to-No Maintenance
- **CONS:** Lower Order Guide Compliance, Potential Overlap Between Suppliers
- **BEST USES:** For Unpredictable Categories (e.g., Maintenance), New Categories, and New Customers

#2 – ADD CATEGORY RESTRICTIONS
PREVENT OFF ORDER GUIDE ORDERING FROM TARGETED CATEGORIES

- **PROS:** Eliminates Supplier Overlap, Handles "New" Products, Guides Users to Appropriate Vendors, Very Little Maintenance
- **CONS:** Sub-Optimal Order Guide Compliance
- **BEST USES:** For Large Catalog Suppliers

#3 – ADD OFF ORDER GUIDE APPROVALS
INSTITUTE APPROVAL PROCESSES FOR ANY PURCHASES OFF ORDER GUIDE

- **PROS:** Closely Monitor One-Off Purchases, Good Order Guide Compliance
- **CONS:** Manual Intervention, Delayed Orders
- **BEST USES:** When Transitioning to More Control; For Newer Suppliers

#4 – HIDE OFF ORDER GUIDE
LIMIT SEARCH TO ORDER GUIDE ONLY – CAN ORDER OFF ORDER GUIDE BY ITEM NUMBER USING PRODUCT ENTRY

- **PROS:** Great Order Guide Compliance, Little Visibility to Other Items
- **CONS:** Users Make Trips to Local Vendors, Increases Off-System Spend, Ordering through Corporate Office Increases
- **BEST USES:** For Predictable Categories with Standards; With Well-Developed Order Guides

#5 – LOCKED DOWN OFF ORDER GUIDE
PREVENT ALL OFF ORDER GUIDE ORDERING AND SUPPLIERS PREVENT OFF-SYSTEM ORDERS

- **PROS:** Best Order Guide Compliance, Cannot Order Off Order Guide, Make Immediate Changes to Order Guides with OGM 3
- **CONS:** Users Make Trips to Local Vendors, Ordering through Corporate Office Increases
- **BEST USES:** With Proven Order Guides; With Strong Corporate Support; For Niche Suppliers

YOUR APPROACH TO ORDER GUIDE MANAGEMENT

For each of your OGM 3 vendors, use the spectrum below to indicate your current approach and your desired future approach to Order Guide Management, and then begin to map out a plan to get there.
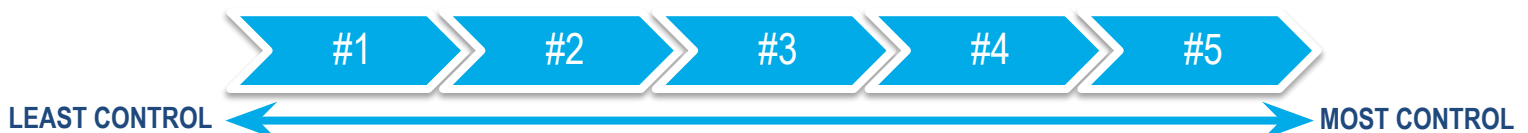
| #1 | #2 | #3 | #4 | #5 |

LEAST CONTROL ←——————————————————————————→ **MOST CONTROL**

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CENTRALIZING YOUR CURRENT ORDER GUIDES

There is no longer a need to create separate Order Guides by Distribution Center (DC) or individual community and then manage individual items. Instead, combine "like" items into ONE Master Item on ONE Master Order Guide, allowing you to ensure Coverage across ALL your DCs and communities!

BENEFITS OF CENTRALIZATION

- Product consistency is easy to see and maintain.
- Prevents gaps on your Order Guide.
- More flexibility to organize order guide products (by category, menu vs. non-menu items, facility specific products).
- Decreases the amount of Order Guide maintenance.

GOING LIVE WITH A <u>FOOD</u> VENDOR

Before going live on OGM 3 with a Food vendor, you will need to complete some "staging" work to get your Food Order Guides configured correctly for maximum impact on your DSSI site.

STAGING YOUR FOOD ORDER GUIDES ON OGM 3

To begin the "staging" process, please contact your Customer Success Manager (CSM). They will help you determine which approach will be best for you.

- Approach 1: Use Excel
- Approach 2: Use OGM 3
- Approach 3: Start from Scratch

*During the "staging" period, any updates you make to OGM 3 will **NOT** be visible to your locations. We have it set-up in a way that you can organize your new Order Guides in a way that best meets your needs before publishing them to your locations. Continue to make updates in Food OGM until you are officially ready to move over to OGM 3.*

OGM.3 ORDER GUIDE MANAGEMENT
FOOD CENTRALIZATION – USING EXCEL

USE <u>EXCEL</u> TO CENTRALIZE YOUR CURRENT ORDER GUIDES

STEP 1: REMOVE PRODUCTS

Remove products that you do not want on any Order Guides. This could include products with low/no recent purchase history.

STEP 2: COMBINE "LIKE" ITEMS TOGETHER INTO ONE MASTER ITEM

Use the **Master Item Name** column to enter Master Item Names for the individual "like" products that you want to group together into ONE Master Item. To illustrate this, in the example below, APPLE RED DEL FCY FRSH, APPLE RED DEL LOCAL, and APPLE RED DEL XFCY 40# FRESH were all grouped into one Master Item titled, "APPLE RED DELICIOUS".

STEP 3: PRIORITIZE THE "LIKE" ITEMS ON EACH MASTER ITEM

Once you've grouped "like" items together, set their individual **Priority** level. Use the other columns (like contract status, price, purchase history, and DC count) to help you determine priority. *Note: The highest priority product, available at a location's DC/OpCo, is the one that will appear on DSSI for those users to purchase.*

STEP 4: ASSIGN EACH MASTER ITEM TO A MASTER ORDER GUIDE

Enter the name(s) of your new **Master Order Guide**. *Note: MOST (if not all) of your Master Items will be part of the same Master Order Guide. To create a smaller subset of products available only to certain communities, use a descriptive name to assign those items accordingly. (e.g., Kosher Items, Holiday Menu, Bistro Locations, etc.)*

Here's an example of what my spreadsheet looks like after completing these steps for all my apple "like" items:

	A	B	C	D	H	I	Q	R	S
1	Master Order Guide Name	Master Item Name	Priority	Description	3 Month Purchas	3 Month $ Volume	DCCount	SingleDC	SecondDC
2				~~ALMOND BLANCHED SLICED~~	0	$0	2	~~Philadelphia~~	~~Virginia~~
3	My Main Order Guide	APPLE BUTTER CUP		APPLE BUTTER CUP	4	$50	1	Central Penn.	
4				~~APPLE GRANNYSMITH SLI IQF~~	0	$0	1	~~Philadelphia~~	
5	My Main Order Guide	APPLE RED DELICIOUS	1	APPLE RED DEL FCY FRSH	36	$387	5		
6				~~APPLE RED DEL FCY WASH FRESH~~	0	$0	1	~~Philadelphia~~	
7				~~APPLE RED DEL FCY WASH LOCAL~~	0	$0	1	~~Pittsburgh~~	
8				~~APPLE RED DEL FCY WSH 100# FRS~~	0	$0	1	~~Virginia~~	
9				~~APPLE RED DEL LOCAL~~	0	$0	1	~~Central Penn.~~	
10	My Main Order Guide	APPLE RED DELICIOUS	2	APPLE RED DEL LOCAL	8	$209	1	Central Penn.	
11	My Main Order Guide	APPLE RED DELICIOUS	3	APPLE RED DEL XFCY 40# FRESH	8	$266	1	Baltimore	
12				~~APPLE RED DELICIOUS MICHIGAN~~	0	$0	1	~~Detroit~~	
13				~~APPLE RED SLI FRSH~~	0	$0	1	~~Virginia~~	
14	My Main Order Guide	APPLE SLICE IN WTR 6.5 LB	1	APPLE SLICE IN WTR 6.5 LB	460	$19,865	4		
15	My Main Order Guide	APPLE SLICE IN WTR 6.5 LB	3	APPLE SLICE IN WTR 6.5 LB	16	$612	1	Baltimore	
16	My Main Order Guide	APPLE SLICE IN WTR 6.5 LB	2	APPLE SLICE IN WTR 6.5LB	356	$17,362	2	Detroit	Pittsburgh

STEP 5: SAVE AND UPLOAD

At this point, save your file and then log in to OGM 3 and use the **Mass Upload** workflow to load the information. *Note: You will need to copy and paste the corresponding columns from your file into the Mass Upload Template.*

STEP 6: REVIEW YOUR WORK

Once the file uploads, you'll see your new Master Order Guide(s) on your OGM 3 home screen and the **Items** link(s) will indicate the number of Master Items included in each Master Order Guide.

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OGM 3 ORDER GUIDE MANAGEMENT
FOOD CENTRALIZATION – USING OGM 3

USE OGM 3 TO CENTRALIZE YOUR CURRENT ORDER GUIDES

Master Items

🔍 Search Table

🖥   🔍   ✖ DELETE   ⤢ GROUP   + ADD

Items per page: **20** ⌄   1 of 19 ‹ **1** ⌄ ›

☐		Master Item Name	Products	Location Coverage	Distribution Center Coverage	Actions
☐	›	Allspice	2	5/5	5/5	✏ Edit ⤢ Ungroup
☐	⌄	Apple Juice	4	5/5	5/5	✏ Edit ⤢ Ungroup

Priority	Product #	Description
1	4752083	JUICE CONC APPLE BLND 100% 4X1
2	4751463	JUICE CONC APPLE 100% 4X1 BIB
3	2274124	JUICE APPLE CONC DISP 6X1
4	4757666	JUICE CONC ORG BLND 100% 4X1

STEP 1: REVIEW MASTER ITEMS
- Log in to OGM 3 and find the Master Order Guide that was loaded for your food vendor and click the **Items** link.
- Review the **Products** column to see what "like" items have already been grouped together for a Master Item.
- Use the arrows to see the individual products and their priority within each Master Item.

STEP 2: REMOVE MASTER ITEMS
- Remove Master Items that you do not want on the Order Guide by checking the boxes and clicking **DELETE**.

STEP 3: EDIT MASTER ITEMS
- To edit or add more items to a Master Item, click **Edit** and follow the instructions on the screen.
- To adjust the priorities of products within a Master Item, click **Edit** and use the drag-and-drop feature to re-prioritize the products.
- To remove an individual product from a Master Item, click **Edit** and then **Delete**.

STEP 4: GROUP "LIKE" MASTER ITEMS TOGETHER INTO ONE MASTER ITEM
- To group "like" items together, click the checkboxes next to each Master Item and then click the **GROUP** button.

STEP 5: UNGROUP MASTER ITEMS, IF NECESSARY
- To ungroup individual items from a Master Item, click **Ungroup** and follow the instructions on the screen.

STEP 6: ENSURE COVERAGE, WHERE NEEDED
- If a Master Item does not have full coverage, but you need it to, click **Edit** and then **Search** to search for additional "like" items to add to the Master Item and then use the drag-and-drop feature to prioritize the items.

Group / Ungroup Master Items   🖫 SAVE

▾ Apple Juice (5/5)

☐	Product #	Description	Pack / Size	UM
☐	4752083	JUICE CONC APPLE BLND 100% 4X1	1/3 GAL	-
☐	4751463	JUICE CONC APPLE 100% 4X1 BIB	1/3 GAL	-
☐	2274124	JUICE APPLE CONC DISP 6X1	4/90OZ	-
☐	4757666	JUICE CONC ORG BLND 100% 4X1	1/3 GAL	-

MOVE SELECTED

MOVE ALL

UNDO CHANGES

New Master Item ✏ (0/5)

Product #	Description	Pack / Size	UM
No Products			

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GRIDVIEW
(DISTRIBUTION CENTERS & COVERAGE TAB)

OGM.3 GRIDVIEW
AN AT-A-GLANCE VIEW OF PRODUCTS & COVERAGE

USE THE DISTRIBUTION CENTERS & COVERAGE TAB

The **Distribution Centers & Coverage** tab represents your Master Item in a gridview, providing an at-a-glance view of selected products, boosted products, excluded products, and overall coverage.

To get to this view, go to any **Master Item** page and choose **Distribution Centers & Coverage**.

Here's how to interpret what you're seeing:

- First, this Master Item does not have full coverage because Pittsburgh has the red X, indicating that there are no products available.
- Second, Central California, Jackson, and Jacksonville are all receiving first priority products, shown by the green checkmark.
- Third, Atlanta has the first product available (gray checkmark), but will receive the second priority product because it has been boosted (green up arrow).
- Lastly, even if the first and third products become available at Jackson, they will never be available to users because they've been excluded (red circle with white X).

OGM.3 GRIDVIEW
BOOST AND EXCLUDE PRODUCTS

The **Distribution Centers & Coverage** tab not only allows you to see your Master Item in a gridview, it also allows you to boost products and exclude products.

BOOST OR EXCLUDE PRODUCTS

Boosting is used when you want to override the normal priority with an exception. This is often done when communities in certain regions are insisting on a more expensive, but more authentic-to-them item. Examples: a certain tortilla for the southwest or a certain bagel in the northeast.

Excluding is used when you want to exclude one of the items within a Master Item from ever being purchased by certain communities. This is often done when there are certain 'specialty' products available for one of your higher-end communities to purchase, but you don't want them available for all communities to purchase.

Follow these steps to boost or exclude a product:

1. Click the cell that you want to make a priority exception for.
2. Choose **Boost this Product** or **Exclude this Product**.

To remove a boost or an exclusion, click the cell and choose to **Remove**.

OGM.3 GRIDVIEW
THE ICONS

WHAT DO THE ICONS MEAN?

Here's a bit more information about what the icons mean:

✅ Selected order guide product	This is the selected product for the DC based on the priority and the selection rule.
✓ Available options	This product could add back-up coverage at this DC, but is not currently used by the DC.
↑ Boosted product	This product has been boosted at this DC; a priority exception has been made.
↑ Unavailable boosted product	This product was previously boosted for this DC but is no longer available and will not be returning.
✗ No available products	This product has been excluded at this DC, making it unavailable for communities to purchase.
❌ Excluded product	This DC does not have coverage with any of the selected products.

OGM.3

WORKFLOWS

WHAT IS A MASTER ORDER GUIDE?

A Master Order Guide is a list of products or ingredients that you can then assign to your locations. Create Master Order Guides by location type (e.g., Assisted Living, Senior Living), by concept type (e.g., bistro, fine dining), by food type (e.g., deli, frozen), by menu type (e.g., fall menu, gluten-free menu), by event (e.g., Thanksgiving, emergency), or whatever makes sense!

You can assign multiple Master Order Guides to a location. Then, OGM 3 will automatically merge all of them, creating a list of products that are available for that location to order on DSSI. That list of orderable products is considered that location's Order Guide.

CREATE A MASTER ORDER GUIDE

While you won't have to create all of your Order Guides from scratch, OGM 3 allows you to create multiple Master Order Guides for each one of your vendors. To do so, follow these steps:

1. From the main screen, select the **+ NEW** button in the upper-right corner.
2. Enter a **Name** for your Master Order Guide.
3. Make a selection from the **Select a Supplier** drop-down menu. Note: Only Suppliers you are connected with on OGM 3 will appear in this list.
4. Double-check your work and click **Save**.

By default, a newly created Master Order Guide will be automatically assigned to all of your locations. Before going any further, you'll want to review that list of locations and unassign any that don't pertain to the Master Order Guide you're currently creating/reviewing.

WHEN SHOULD I UNASSIGN LOCATIONS?

By default, a newly created Master Order Guide will be automatically assigned to all of your locations. Unassign locations when you're building a Master Order Guide that only pertains to some of your communities. Remember, there are a lot of ways that you can create Master Order Guides (e.g., by concept type, food type, menu type, event, etc.) and you'll probably have times where you'll want to create a special list of products for only one or two locations and not all of them.

UNASSIGN LOCATIONS FROM A MASTER ORDER GUIDE

Before going any further, you'll want to review that list of locations and unassign any that don't pertain to the Master Order Guide you're currently creating/reviewing.

In the example below, the Master Order Guide titled, "Medical Supplies" was created and automatically assigned to all 8 of its locations. You might see 33, 76, or even 453. Again, it will be automatically assigned to all of your locations set-up within DSSI. To unassign any locations (or, in the future, assign locations), follow these steps:

1. From the main screen, find the Master Order Guide you created and select the **Locations** link.
   (Shown here as "8 Locations".)
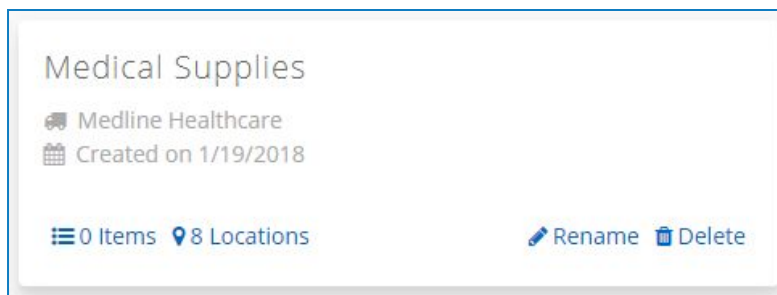
2. Use the checkbox in the upper-left corner to "uncheck all" (or "check all") and use each individual checkbox to assign (or unassign) each individual location to that Master Order Guide.
3. Click the **Save Enabled Locations** in the upper-right corner. You will be prompted to confirm your changes.

	Name	Assignment Status	ID	Address Line 1	Address Line 2	City	State	Zip	Supplier Name	Distribution Center Number
☑	Colonial Manor	Assigned	FMOG6	342 Fake St.		Pawtucket	RI	02860	Direct Supply Equipment	
☑	Corporate	Assigned	0000	6767 N Industrial Dr	#7	Milwaukee	WI	53223	Direct Supply Equipment	
☑	Dade Manor	Assigned	FMOG4	342 Fake St.		Naperville	IL	60540	Direct Supply Equipment	
☑	Eastbrooke Care Center	Assigned	FMOG3	321 Fake Ave		Berwyn	IL	60402	Direct Supply Equipment	
☑	Faith Memorial	Assigned	33949	811 Garner Rd.		Pasadena	TX	77502	Direct Supply Equipment	

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WHAT ARE MASTER ITEMS?

Master Items can either a) have a **one-to-one relationship** with a product or b) consist of **a list of "like" products** where you want to drive coverage and availability across all your locations for when products are not stocked, get discontinued, or become unavailable for whatever reason.

Think of it this way: Only <u>one</u> product within a Master Item is displayed to a DSSI user. That product is the one you've listed as the highest priority, that is also stocked and available to that community. So if you want multiple items to be available, you'd need to create a Master Item for each one.

MASTER ITEMS AS A ONE-TO-ONE RELATIONSHIP

The **one-to-one relationship** of Master Items to individual products is typically used for <u>non-food items</u>. For example, the Direct Supply product, *9000 Topaz Bariatric Wheelchair*, becomes its own Master Item called, *9000 Topaz Bariatric Wheelchair*. And then Direct Supply product, *Panacea® Fixed-Frame Wheelchair*, also becomes it's own Master Item called, *Panacea® Fixed-Frame Wheelchair*. If you didn't make those two items separate Master Items and instead put them both into one Master Item, then your DSSI users would only see *one* of them and not both of them.

MASTER ITEMS AS A LIST OF "LIKE" PRODUCTS

The concept of **a list of "like" products** within a Master Item is typically used for <u>food items</u>. For example, you may want separate Master Items for generic ingredients like each of the following: eggs, milk, and butter. These Master Items would then each include a list of products that are prioritized in order to drive coverage of an ingredient across multiple regions.

For example, the same apple slices are not available from every single distribution center (DC) for each one of your locations so rather than risk no apple slices on an Order Guide or, too many choices of apple slices on an Order Guide, you should create a generic "Apple Slices" Master Item. You would then add multiple "apple slice" products to that Master Item and prioritize them in the order that you'd want them to appear to users. If the priority #1 product was stocked and available, it would appear on DSSI. If it wasn't stocked or was unavailable to purchase, then the priority #2 product would automatically appear. And so on and so forth. Let's use this chart to explain the example further:

Master Item Name	Priority	Product #	DSSI Description	046	013	019	164	057	011	006
Apple Slice	1	1467968	APPLE SLICE IN WTR 6.5 LB		S*		S*		S*	S*
Apple Slice	2	4061875	APPLE SLICE IN WATER PK 6.5 LB	S*	S*				S	
Apple Slice	3	4015574	APPLE SLICE IN WTR 6.5LB	S	S		S*		S	

- Product #1467968 is listed as the top priority. It is stocked and available to purchase at the following DCs: 013, 164, 011, and 006. That means, it's the only apple slice product of the three that appears to all locations tied to those DCs.
- Product #4061875 is listed as the second priority. Because the top priority product is not available at the 046 and 019 DCs, the second priority product is the only one of the three that appears to the locations tied to those DCs. Plus, as soon as the 011 DC runs out of product #1467968, product #4061875 is stocked and will immediately appear to users at those locations to order. This brings efficiencies for you and your users! By putting in the work to prioritize items, you reduce the amount of gaps in your Order Guides that need to be addressed when items are discontinued.

Note: To account for regionality and availability, you may also wish to follow this process for <u>non-food Master Items</u> (e.g., latex gloves, sporks, #2 pencils).

To add Master Items to a Master Order Guide, follow these steps:

1. From the main screen, find the Master Order Guide you created and select the **0 Items** link.
2. Click the **+ Add** button.
3. Search for a product to add by entering an item number or keyword(s) in the **Search** text box.
   - Hint: Use the **+ Add by Product Number** to add multiple item numbers at once.
   - Hint: Use the **Filters** button to narrow your search results even further.
4. Review the **Search Results** that populate.

ADD MASTER ITEMS AS ONE-TO-ONE RELATIONSHIP

5. Use the **+ Add** action to select the item you wish to add.
6. Click **ADD MASTER ITEM**.

ADD MASTER ITEMS AS A LIST OF "LIKE" PRODUCTS

7. Use the **+ Add** action to select the item(s) you wish to add. As you do so, the **Total Coverage** alert (next to the "Selected Products" heading) will update accordingly.
   - Hint: Use the **Only Show Options with More (+) Coverage** toggle to show items that will help you close the coverage gap.
8. Review all of the items in the "Selected Products" section and prioritize them as necessary by dragging them up or down. To boost a product at a DC, use the "Distribution Centers & Coverage" sectio. As a reminder, when OGM 3 generates each location's Order Guide, DSSI will display the highest priority product (or boosted product) within a Master Item, that is available to that location.
9. After reviewing the prioritization of the products and the name of your Master Item, click **Add Master Item**.

OGM.3 WORKFLOWS
GROUP MASTER ITEMS

Master Items could have a one-to-one relationship with a product, but they could also consist of **a list of "like" products** to drive coverage and availability across your locations. In that case, you must ensure that they truly are "like" one another.

For example, if you notice that you have two Apple Slice in Wtr 6.5lb Master Items, you might want to **Group** them together for better coverage and availability and then use **DSSI Sage Selects** to prioritize additional items.

GROUP "LIKE" MASTER ITEMS TOGETHER INTO ONE MASTER ITEM

1. Review the **Products** column to see what "like" items have already been grouped together for a Master Item.
2. Use **Location Coverage** and **Distribution Center Coverage** to understand a Master Item's current Coverage.
3. Use the arrow icon to expand your view and see the individual products within each Master Item.
4. To group "like" items together, click the checkboxes next to each Master Item and then click the **GROUP** button.
5. On the **Group / Ungroup Master Items** screen, click **MOVE ALL**, enter a **New Master Item** name, and **SAVE**.
6. On the *Master Item Edit* page, review the **Priority** for each of the **Selected Products** and/or use DSSI Sage to add additional products to your Master Item. To adjust a Priority, move a product row up or down.
   Note: The highest priority product, available at a community's DC/OpCo, is the one that will appear on DSSI for those users to purchase.
7. When finished, click the **SAVE MASTER ITEM** button.

Master Items

APPLE SLICE

🖥 🔍   ✕ DELETE   ⤢ GROUP   + ADD

Items per page: 20 ⌄   1 of 1 ‹ 1 ⌄ ›

☐	Master Item Name	Products	Location Coverage	Distribution Center Coverage	Actions
☑ ›	APPLE SLICE IN WTR 6.5LB	1	13/15	3/4	✏ Edit 🗑 Delete
☑ ›	APPLE SLICE IN WTR 6.5 LB	1	2/15	1/4	✏ Edit 🗑 Delete

Group / Ungroup Master Items

💾 SAVE

▾ Apple Slice In Wtr 6.5Lb (1/4)

	Product #	Description	Pack / Size	UM
☐	4015574	APPLE SLICE IN WTR 6.5LB	6/#10	CA

▾ Apple Slice In Wtr 6.5 Lb (3/4)

	Product #	Description	Pack / Size	UM
☐	1467968	APPLE SLICE IN WTR 6.5 LB	6/#10	CA

MOVE SELECTED

MOVE ALL

UNDO CHANGES

New Master Item ✏ (0/4)

Product #	Description	Pack / Size	UM
No Products			

🗑 DELETE MASTER ITEM   ✓ SAVE MASTER ITEM

Select Products   Distribution Centers & Coverage

Display Options   ☐ Est. Net Price   ☐ Categories and GL Assignments   ☑ Expanded Descriptions

Selected Products • 5/5 Total Coverage

		Product	Brand	Pack Size	U/M	Price	Price per Unit	Prop	Stocking	Coverage	Actions
▸	═	4015574 Apple Slice In Water 6.5lb	🍃 SYS CLS	6/#10	-	-	-			5/5	🗑 Delete
▸	═	1467968 Apple Slices In Water 6.5#	🍃 SYS CLS	6/#10	-	-	-			1/5	🗑 Delete

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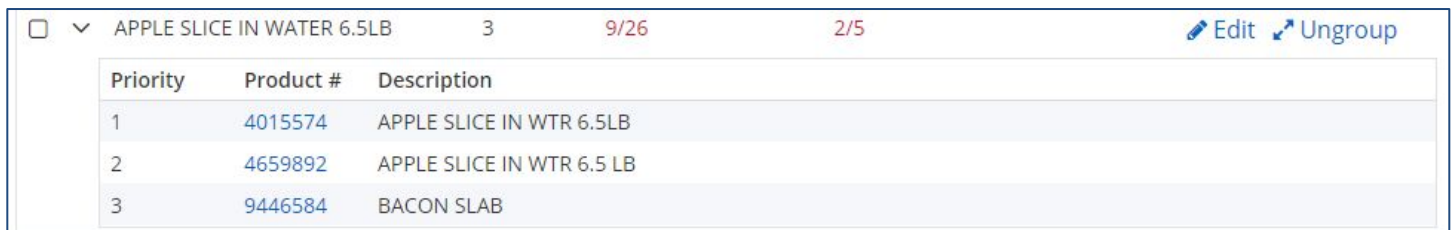
Master Items could have a one-to-one relationship with a product, but they could also consist of **a list of "like" products** to drive coverage and availability across your locations. In that case, you must ensure that they truly are "like" one another.

For example, if one of your users contacts you and says they can't find Bacon Slab (as in the screenshot below), you could use OGM 3 to troubleshoot the issue and realize that you accidentally added Bacon Slab to your Apple Slice in Water Master Item. In that case, you'd need to **Ungroup** them so both products appear to your users.
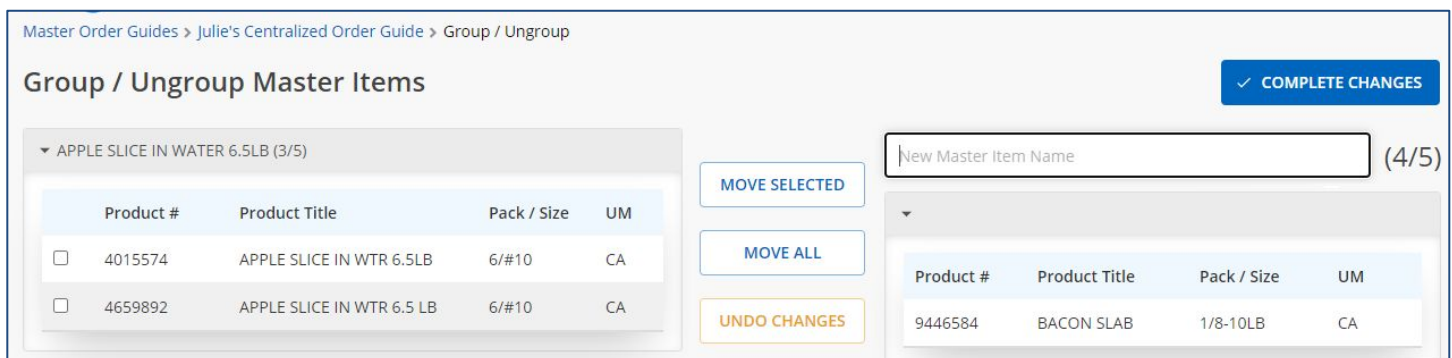
UNGROUP MASTER ITEMS, IF NECESSARY

1. To ungroup individual items from a Master Item, click **Ungroup**.

		APPLE SLICE IN WATER 6.5LB	3	9/26	2/5		✎ Edit	⤢ Ungroup

Priority	Product #	Description
1	4015574	APPLE SLICE IN WTR 6.5LB
2	4659892	APPLE SLICE IN WTR 6.5 LB
3	9446584	BACON SLAB

2. On the **Group / Ungroup Master Items** screen, do the following:
   - Click the checkbox next to the name of the product you wish to ungroup.
   - Click the **MOVE SELECTED** button.
   - Enter a **New Master Item** name for the product.
   - Choose **COMPLETE CHANGES**.

Master Order Guides › Julie's Centralized Order Guide › Group / Ungroup

Group / Ungroup Master Items   ✓ COMPLETE CHANGES

▼ APPLE SLICE IN WATER 6.5LB (3/5)

	Product #	Product Title	Pack / Size	UM
☐	4015574	APPLE SLICE IN WTR 6.5LB	6/#10	CA
☐	4659892	APPLE SLICE IN WTR 6.5 LB	6/#10	CA

MOVE SELECTED

MOVE ALL

UNDO CHANGES

New Master Item Name   (4/5)

▼

Product #	Product Title	Pack / Size	UM
9446584	BACON SLAB	1/8-10LB	CA

3. On the next screen, click the **SAVE MASTER ITEM** button.
4. Repeat that process as necessary. Example: If you have a Master Item that contains four individual items and you want each item to be a new, separate Master Item, you'd have to go through that process three times: First to remove/rename one item, then to remove/rename the second item, and then to remove/rename the third item. And then if you needed to rename the fourth item, you could also do that.

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OGM.3 WORKFLOWS
USE DSSI SAGE

VIEW DSSI SAGE ITEMS

For some products, you may see suggestions offered by DSSI Sage. DSSI Sage is an artificial intelligence (AI) technology that DSSI is adding into various applications, including OGM 3.

As you review your search results and begin to prioritize products for a Master Item, consider adding those DSSI Sage products to that Master Item.

Simply click the **+ Add** link and it will pull the product up to your list of "Selected Products".

Selected Products • 4/5 Total Coverage

			Product	Brand	Pack Size	U/M	Price	Price per Unit	Usage (6 Months)	Prop	Stocking	Coverage	Actions
▶	=	🔒	4061875 Apple Slice In Water Pk 6.5 Pound	🍃SYS REL	6/#10	CA	$63.21 - $64.86		-			2/5	🗑 Delete
▶	=	🔒	1467968 Apple Slices In Water 6.5#	🍃SYS CLS	6/#10	CA	$62.70 - $67.72		-			3/5	🗑 Delete

Add Products   + Add by product number

Search by description, product number, manufacturer number, etc.

| apple slice in water | | | | | ⬤✕ Only show options with more (+) coverage | | | | **FILTERS** |

	Product	Brand	Pack Size	U/M	Price	Price per Unit	Usage (6 Months)	Prop	Stocking	Coverage	Actions
▶	7147450 Apple Slice In Water	DELMONT	6/#10CAN	CA	$55.92 - $59.60		-	All		0/5 (+0)	+ Add
▶	4015574 Apple Slice In Water 6.5lb	🍃SYS CLS	6/#10	CA	$66.85 - $74.63		-			2/5 (+0)	+ Add
▶	4659892 Apple Slices In Water 6.5#	MUSSLMN	6/#10	CA	$62.16 - $67.53		-	All		1/5 (+0)	+ Add
▶	1467968 Apple Slices In Water 6.5#	🍃SYS CLS	6/#10	CA	$62.70 - $67.72		-			3/5 (+0)	🗑 Delete
▶	4061875 Apple Slice In Water Pk 6.5 Pound	🍃SYS REL	6/#10	CA	$63.21 - $64.86		-			2/5 (+0)	🗑 Delete

‹ ❶ ›   1–5 out of 5 results

🍃 DSSI SAGE SELECTS

	Product	Brand	Pack Size	U/M	Price	Price per Unit	Prop	Stocking	Coverage	Actions
▶	4659892 Apple Slices In Water 6.5# **Supplier-Recommended Substitute**	MUSSLMN	6/#10	CA	$62.16 - $67.53		All		1/5 (+0)	+ Add
▶	7376928 Apple Chipped In Water	MUSSLMN	6/# 10	CA	$92.20			Demand	1/5 (+0)	+ Add

WHAT IS MASS UPLOAD?

Mass Upload allows you to upload *multiple* products to *multiple* Master Items on *multiple* Master Order Guides! It's best used for thousands of items OR when you need to group and prioritize <u>Food</u> products. Otherwise, use the Mass **Change** feature.

UPLOAD PRODUCTS USING THE MASS UPLOAD FEATURE

1. Go the Master Order Guides screen of OGM 3.
2. Click the **Mass Uploads** button.
3. Choose the **Download Template** link and open the file.
4. Enter the required information into the spreadsheet and save it to a location you will remember.
5. If you're a Food user completing your Staging work, you'll want to copy the relevant columns from your "OGM 3 Food Consolidation Report" into the corresponding columns of this template. (i.e., Master Order Guide Name, Master Item Name, Priority, and Product #.)
6. Save your file.
7. Go back to the **Mass Uploads** screen, **Select a Supplier**, **Choose a File**, and click **UPLOAD**.

Master Order Guide Name (Required)	Master Item Name (Required)	Product # (Required)	Priority (Optional)
Sysco Master Order Guide	Almond Blanched Slice	6814594	1
Sysco Master Order Guide	Almond Blanched Slice	5963848	2
Sysco Master Order Guide	Apple Golden Deliciou	2503696	1
Sysco Master Order Guide	Apple Golden Deliciou	4352985	2
Sysco Master Order Guide	Apple Golden Deliciou	1007293	3
Sysco Master Order Guide	Apple Golden Deliciou	1283092	4
Sysco Master Order Guide	Apple Golden Deliciou	1432616	5
Sysco Master Order Guide	Apple Granny Smith	2795896	1
Sysco Master Order Guide	Apple Granny Smith	1303700	2
Sysco Master Order Guide	Apple Granny Smith	1511351	3
Sysco Master Order Guide	Apple Granny Smith	2174274	4

Mass Upload

⬇ Download Template

Select a Supplier

🚚 Sysco

⬆ Choose a file...   test.xlsx

CANCEL   ⬆ UPLOAD

If there were any errors with what you entered, you'll be able to **Download** a **Mass Import** report from the **Reports** screen. If there were no errors, your new Master Order Guide(s) and/or Master Item(s) will appear on the main **Master Order Guides** screen.

Generated Reports

Name	Date	Row Count	Actions
Mass Import	2/20/2019 3:30 PM		Download

Sysco Master Order Guide

🚚 Sysco
📅 Created on 2/20/2019

☰ 3 Items 📍 0 Locations   ✏ Rename 🗑 Delete

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WHAT IS AN ITEM RESTRICTION?

A Restriction is a constraint you determine for items that prevents your communities from ordering specific items on DSSI unless the items are on one of your OGM 3 Master Order Guides.

If you restrict an item that is already on a Master Order Guide, that item will be seen and orderable by locations tied to that Master Order Guide. Any location not assigned to that Master Order Guide would see your Restriction Message and not be able to order the item. This is referred to as *Order Guide Status Trumps Restriction*.

RESTRICT ITEMS

Go to the **Restrictions** screen to see a list of all the Item and Category Restrictions by Location. You can also remove Restrictions or follow this process to add <u>Item</u> Restrictions.

1. If the Supplier is not yet listed, you'll need to create a Restrictions list for the Supplier by clicking **NEW**.
2. Click the **Items** link under the appropriate Supplier's Restrictions list.
3. Click the **+ Add** button and then enter the **Item Numbers to Restrict**. You can enter them one at a time; or copy and paste an entire list of items. As you do so, the product information for each item will automatically populate.
4. Leave the **Default Restriction Message** as-is or customize it to your needs.
5. If needed, individually modify the **Restriction Message** by using the field next to any item.
6. When finished, review your work and click **SAVE**.
7. If the item(s) you restricted were on any Master Order Guides and you want them to be unorderable, be sure to remove them.

> Please note: If you place a restriction on products that are currently active on an order guide, they will still be orderable. Please ensure you remove restricted products from any/all applicable existing order guides to ensure they can no longer be ordered.

Restrictions   + NEW

Direct Supply Health	McKesson	Medline Restrictions
🚚 Direct Supply Health	🚚 McKesson	🚚 Medline Healthcare
☰ 9 Items ✅ 3 Categories ✏ Rename	☰ 9,620 Items ✅ 0 Categories ✏ Rename	☰ 0 Items ✅ 2 Categories ✏ Rename
📍 24 Locations 🗑 Delete	📍 12 Locations 🗑 Delete	📍 1 Location 🗑 Delete

Note: OGM 3 allows you to create different lists of Restrictions and assign them to different locations. Please note that a location can only be assigned to one Restriction List for a Supplier; not multiple.

Item Restrictions
Direct Supply Health - Direct Supply Restrictions

🗑 REMOVE SELECTED   + ADD

	Item Number	Description	Restriction Message	Actions
☐	08410	Copy Paper, 92 Brightness, 20lb, 8-1/2 x 11, White, 5000 Sheets/Carton	This item may not be ordered. Please order this from X Vendor.	🗑 Remove
☐	H3397	Copy Paper, 98 Brightness, 28lb, 18 x 12, Bright White, 500 Sheets	This item may not be ordered. Please order from our Office Supplies Vendor.	🗑 Remove

Here's an example: You created two Master Order Guides for Medline. You called one "All Products" and assigned it to all your locations. (It does *not* include the five restricted items.) You called the other one "AZ Nitrile Gloves" and only assigned it to your four Arizona locations. (It *only* includes the five restricted items.)

Locations only assigned to the "All Products" Master Order Guide will see the Restriction Messages for those items, but will not be able to order them. Whereas, the four Arizona locations which are assigned to both Master Order Guides, will not see the Restriction Messages and <u>will</u> be able to order those products.

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WHAT IS A CATEGORY RESTRICTION

A Category Restriction is a constraint you determine, applied to a Supplier's entire product category, that applies to all items within that category and any items that may get added to that category in the future.

If you add an item from a restricted category to a Master Order Guide, that item will be visible and orderable by locations tied to that Master Order Guide. Any location not assigned to that Master Order Guide would see your Restriction Message and not be able to order the item. This is referred to as *Order Guide Status Trumps Restriction*.

RESTRICT CATEGORIES

Go to the **Restrictions** screen to see a list of all the Item and Category Restrictions by Location. You can also remove Restrictions or follow this process to add **Category** Restrictions.

1. If the Supplier is not yet listed, you'll need to create a Restrictions list for the Supplier by clicking **NEW**.
2. Click the **Categories** link under the appropriate Supplier's Restrictions list.
3. Navigate the Supplier's category tree structure using the arrow buttons.
4. Choose the **Create Restriction** button to restrict a category or subcategory.
5. Enter a **Restriction Message**.
6. To Unrestrict a subcategory from a Restricted category, use the **Unrestricted** button.
7. When finished, review your work and click **SAVE**.
8. If the categories you restricted were on any Master Order Guides and you want them to be unorderable, be sure to remove them.

Note: Note: OGM 3 allows you to create different lists of Restrictions and assign them to different locations. Please note that a location can only be assigned to one Restriction List for a Supplier; not multiple.

Here's an example: You created two Master Order Guides for Medline. You called one "All Products" and assigned it to all your locations. (It does *not* include the category you restricted.) You called the other one "Corporate Ordering" and only assigned it to your Corporate location. (It *only* includes the one category of products that you restricted.)

Locations only assigned to the "All Products" Master Order Guide will see the Restriction Messages for those items, but will not be able to order them. Whereas, your Corporate location which is assigned to both Master Order Guides, will not see the Restriction Messages and will be able to order those products.

WHAT IS AN ALERT?

Use the **Alerts** screen to find and resolve your discontinued product and lost coverage alerts.

RESOLVE AN ALERT

Alerts should be reviewed relatively frequently so you can see how products are changing across your Distribution Centers (DCs) and raise any questions with your distributor.

- **Filter:** Use the filters to narrow your alerts to the ones you want to focus on.
- **Sort:** Sort by the **Usage** column to find the most frequently purchased products, or sort by any other column, to review those alerts first.
- **Dismiss:** Use the checkboxes on the left-hand side of the page and then click the **Dismiss** button in the upper-right corner of the page to dismiss multiple alerts at once, when no further action is needed.
  - Note: Dismissing an *Alert*, does not remove the item from Master Order Guides.
- **Resolve:** Select the **Resolve** action to review and manage the impact the discontinuation of the product has had on your Master Item(s). Review the Master Item for **Coverage** gaps and use **View Alternates**, **DSSI Sage**, or **Search** to fill in any gaps before saving.
  - Note: Using **Resolve** allows you to edit the item, which could include removing it from Master Order Guides and/or backing up the item with another item.

Alerts

All Suppliers ▾	All Alerts ▾	Display Options ☑ Master Order Guide Name				🗑 DISMISS ALL (2259)

☐	Discontinued ⇅	Distribution ⇅	Master Item ⇅	Item #	Description ⇅	Brand ⇅	Pack Size	Coverage	Usage (6 Months) ⇅	Ordered	Added to Master Item	Actions
☐	2/19/2021	McKesson	**ALLEVYN DRSG HEEL 4.5X5.5 - 76302100** Ambulatory Surgery Center Med/Surge Formulary OLD	76302100	Foam Dressing Allevyn 4-1/2 X 5-1/2 Inch Heel Cup Style Non-Adhesive without Border Sterile	Smith & Ne	5/BX	Lost	2	9/9/2020	-	🔧 Resolve ⊗ Dismiss
☐	2/19/2021	McKesson	**ALLEVYN ADHESIVE DRESSING 4"X4" PAD 5"X5"OVERALL - 66442100** Ambulatory Surgery Center Med/Surge Formulary OLD	66442100	Foam Dressing Allevyn Adhesive 5 X 5 Inch Square Adhesive with Border Sterile	Smith & Ne	10/BX	Lost	1	9/9/2020	-	🔧 Resolve ⊗ Dismiss
☐	3/4/2021	Jacksonville, Sysco	**Pitcher Plycbn Clr 32 Oz** Standard	4062279	PITCHER PLYCBN CLR 32 OZ	SYSCO	1/3 CT	Lost	0	-	-	🔧 Resolve ⊗ Dismiss
☐	2/10/2021	Jackson, Sysco	**Cracker Wheat Harvest Mill** Food and Nutrition	4532305	CRACKER WHEAT HARVEST MILL	SUNSHIN	300/2 PK	Lost	0	-	-	🔧 Resolve ⊗ Dismiss
☐	2/21/2021	Jacksonville, Sysco	**Tortilla Flour 8 Pressed** Food and Nutrition	4690822	TORTILLA FLOUR 8 PRESSED	LA BAND	12/12 CT	Lost	0	-	-	🔧 Resolve ⊗ Dismiss
☐	3/4/2021	Jackson, Sysco	**Pitcher Plycbn Clr 32 Oz** Standard	4062279	PITCHER PLYCBN CLR 32 OZ	SYSCO	1/3 CT	Lost	0	-	-	🔧 Resolve ⊗ Dismiss

---

DOWNLOAD YOUR DISCONTINUED ALERT REPORT

Download a full list of all On-Order Guide products that have been recently inactivated or discontinued. Just go to the *Reports* page and click **Generate Report** for the "On-Order Guide Discontinued Item Alerts" report.

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REMOVE A MASTER ITEM FROM A MASTER ORDER GUIDE

To remove a Master Item from a Master Order Guide, follow these steps:

1. From the main screen, find the appropriate Master Order Guide and select the **Items** link.
2. Scroll down until you see your **Master Items**.
3. Use the **Search Table** box to search for the Master Item. Enter the item number or keyword(s). As you type, the list will automatically update to only display the results pertaining to your search.
4. Once you've found the Master Item(s) you wish to remove, click the check box(es) and then use the **Delete** button to delete the Master Item(s) from a Master Order Guide.

Master Items

| | cork board | | | | 🖥 | 🔍 | ✖ DELETE | ⤢ GROUP | + ADD |

Items per page: **20** ⌄   1 of 3 ‹ **1** ⌄ ›

		Master Item Name	Products	Location Coverage	Distribution Center Coverage	Actions
☐	›	1-Door Enclosed Wood-Frame Cork Board, 18"W X 24"H - Frame Finish: Cherry	1	18/18	1/1	✏ Edit
☑	›	1-Door Enclosed Wood-Frame Cork Board, 18"W X 24"H - Frame Finish: Light Oak	1	18/18	1/1	✏ Edit

REMOVE AN ITEM FROM A MASTER ITEM

To remove a prioritized item from a Master Item, follow these steps:

1. From the main screen, find the appropriate Master Order Guide and select the **Items** link.
2. Scroll down until you see your **Master Items**.
3. Use the **Search Table** box to search for the Master Item. Enter the item number or keyword(s). As you type, the list will automatically update to only display the results pertaining to your search.
4. Once you've found the Master Item that contains the individual item you wish to remove, use the **Edit** link to edit the Master Item.
5. Find the individual item you wish to remove and select the **Delete** link to delete it from the Master Item.
6. Click the **Save Master Item** button to save your work.

Display Options   ☐ Est. Net Price   ☐ Categories and GL Assignments   ☑ Expanded Descriptions

Selected Products • 1/1 Total Coverage

		Product	Brand	Pack Size	U/M	Price	Price per Unit	Coverage	Actions
▸	=	2MD90 1-DOOR ENCLOSED WOOD-FRAME CORK BOARD, 24"W X 36"H -CHERRY	United Vis	1/EA	EA	$232.00	-	1/1	🗑 Delete
▸	=	2MD89 1-DOOR ENCLOSED WOOD-FRAME CORK BOARD, 24"W X 36"H -LIGHT OAK	United Vis	1/EA	EA	$232.00	-	1/1	🗑 Delete

QUICK TIPS

⭐ Repeat this process if the item appears in multiple places.

⭐ Once an item is removed from a Master Order Guide, it becomes unorderable for your users. If the item was also on a Restriction List, the restriction will take effect and users will see your Restriction Message.

OGM.3 WORKFLOWS
USE MASS CHANGE (MASS ADD AND MASS REMOVE)

USE MASS CHANGE TO ADD OR REMOVE A MASS AMOUNT OF ITEMS

Use the **Mass Change** feature to <u>add</u> OR <u>remove</u> *multiple* products from *multiple* Master Order Guides!

Click the **Mass Change** button on the Master Order Guides screen, choose the **Start New Mass Change** button, and then follow the chevron steps and instructions on the next screens:

1. **Add Item Numbers:** Choose whether you want to **Add Items** or **Remove Items**, **Select a Supplier**, **Enter or Paste Item Numbers**, and then choose **Verify Items**.
2. **Verify Items:** Verify the product information that populated on the next screen and then click the **Select Master Order Guides** button.
3. **Select Order Guides:** Pick the Master Order Guide(s) where you want these products to be added/removed.
4. **Review Changes:** Review the changes that will be applied to your Master Order Guide(s) and then click **Apply Changes**.
5. **Apply Changes:** The **Apply Changes** page will let you know that you can start another Mass Change, or continue working elsewhere in OGM 3.

QUICK TIPS

⭐ The **Mass Change** screen will also allow you to see the Mass Changes that are currently in progress and have recently been completed.

VIEW GL GROUP ASSIGNMENTS

- To <u>view</u> the GL Group a product is assigned to, go to the *Master Item Edit* page for any product that is on a Master Order Guide.
- Under **Display Options**, select **Categories and GL Assignments**.
- The GL Group assigned to that product will then appear underneath the product itself.

EDIT GL GROUP ASSIGNMENTS

- To <u>edit</u> the GL Group a product is assigned to, first follow the steps above.
- Then, click the GL Group that the product is assigned to.
- A pop-up window will appear that identifies the GL Group the product is assigned to as well as the other GL Groups that you could re-assign it to. Individual GL codes that are part of that GL Group will also be listed.
- Choose a new GL Group and click **Assign GL Group**.
- The new GL Group assignment will be visible to your DSSI end-users within seconds!

TROUBLESHOOTING

OGM.3 TROUBLESHOOTING
FIXING A SCREEN "SHAKE" ISSUE

If you notice your computer screen "shaking" while processing alerts in OGM 3, check the control panel on your computer to ensure it is set to the highest **refresh rate**. Instructions on how to do this are below. If these instructions don't work for you, or if you need help, please reach out to your IT department for assistance.

ADJUST YOUR SCREEN'S REFRESH RATE

- Go to the home screen on your computer monitor and activate your **Display Settings**. *Note: For non-Mac users, this is typically done by right clicking on that screen.*
- Next, look for some type of **Advanced Display Settings**.
- Find something that references your **Display Adapter Properties**.
- From there, you'll want to find a section specific to your **Monitor**.
- Locate the **Screen Refresh Rate** and select the highest refresh rate from the list of options.

If this does not work, please contact your IT department for further troubleshooting.

OGM.3

END