

Subject	Preparing Custom Shares on GrownBy
Author	Cara Fraver, Farm Generations
Purpose	How to Open Customizable Shares on GrownBy
Items required	Login Credentials, GrownBy, Printer
Frequency	Before each distribution, likely weekly

How to use this SOP: You can make a copy of this document and edit it. You might want to change language like “Before The Customization Window Opens” to “Friday at 6 am.” You can also add other tasks or staff names to your version of the doc, of course!

Before The Customization Window Opens: (Up to 12 hours before opening. You can edit this with the time for your farm.) **

- ☐ **Add inventory** of the products that you have available for this customization. Zero out products that you don’t have. Do this on the main Products page.
- ☐ **Unhide** products that you want to have available from the products page. Bulk edit is helpful here.
- ☐ **Prioritize** products that you want to push into the share this week on your Custom Shares Dashboard
- ☐ **Deprioritize** products that you don’t want GrownBy to put in suggested shares on your Custom Shares Dashboard.
- ☐ Adjust details like “only buy in CSA page” or private CSA group, depending on your sales methods. use bulk editing or make edits individually on products page.
- ☐ Adjust “Max Per Order” if using
- ☐ **Enable autorun** on the custom shares dashboard (if you enable autorun more than 12 hours before the opening, you will have to do so again the preview open runs)
- ☐ Review test opening to be sure that there are no errors or warnings to address

12 hours Before the Customization Window Closes (You can edit this with the time for your farm.)

- ☐ Review test closing: this runs automatically 12 hours prior to close. Notification (email and dashboard) will tell you how much product you have left vs how much you need to close, adjust if needed.

After The Customization Window Closes (You can edit this with the time for your farm.)

- ☐ Review close. Orders are placed for those who did not place a custom order. GB tells you what order number GB placed, amount of rollover value in total. No action needed.

TO PACK ORDERS

- ☐ Login to GrownBy
- ☐ Navigate to "Fulfillment"
- ☐ Navigate to "Pick List". Review and export, as necessary. This is like a harvest list. The pick list includes all the items that are needed to fulfill orders for that week. The list can be narrowed by date, location, or types of products. Default is the next 7 days. Reports may run faster with fewer days. Set the start and end day the same if single day distribution.

- ☐ Create labels.
 - ☐ From the Fulfillment page, click on Packing Sheets and filter the view.
 - ☐ Adjust the filters, select the correct dates
 - ☐ Click the Export drop down and choose Export Labels.
 - ☐ A pop-up will open. Choose the number of products (Items per label), Label size, and Type. Roll is for thermal printers; sheet is for inkjet/laser printers. Click Submit.
 - ☐ Select print!
 - ☐ The labels will open in a new tab on your browser. Now you're ready to print. Please note that this step may differ, depending on the operating system and internet browser.
- ☐ Print sign in sheets if you're using them. You can filter these by shares to just have one line per box.
- ☐ Navigate to "Location Summary". Sorting by primary share allows you to see the # of boxes per location. Review and export, as necessary, "Location Summary". This report will verify where boxes/products need to go.

** Regarding timing: You'll get an email about the "test opening" 12 hours before your customization window is set to open. You can and should treat that as a reminder to prepare for the week. If you enable autorun more than 12 hours before your share open, you'll have to enable it. Clicking on Enable Auto Run will trigger an additional test, so you will still be able to check the shares and make sure everything looks correct.