

Home Coop: Tiny Local Consumer Cooperatives Web Ordering System User Guide

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License

HomeCoop is a free software, licensed under [General Public License version 3](#), written in PHP 5.3 using a MySQL 5.5 database.

Audience

This document is written for a consumer cooperative coordinator who uses HomeCoop with administrative permissions and for cooperative order coordinators.

Getting Started with HomeCoop (fresh install)

When your installation of HomeCoop is complete, browsing to the website will lead you to the login page. Enter "admin" for the user name and "123456" for the password to login for the first time.

Things you would like to do right away:

- Go to Members->add a member for you, and in hir "Roles" add "System Administrator". It is recommended to save the login name and password you have chosen in an [encrypted](#) file. Logout and login again using your newly chosen login name and password. Go to Members-> click on "admin" and delete it, so no one will be able to administer your website using its easy-to-guess and published (in this guide and the installation guide) login details.
- If bulk-insert of members (see the installation guide) was not used, fill in all the cooperative members manually.
- Go to Producers and fill in the name for each producer you work with. The value in "Export File Name" will be used in the spreadsheet file name for a producer cooperative order.
- Go to Products and fill in products details for the producers you entered. See the section on **Products** for details.
- Go to Pickup Locations and fill in the pickup locations of your cooperative. See the section on **Pickup Locations** for details.
- Create your first cooperative order in the **Cooperative Orders** screen.
- Set higher permissions for coordinating members. See the sections on **Member Roles** and **Coordination**.
- Send a personal email to each member with a link to the website, the member's login name and initial password. It is recommended not to send all the emails at once, so that time is given to gradually test the installation of HomeCoop and the web hosting performances.

Members Balance Model

HomeCoop is designed by default to support an organizational model in which there's no member fee for joining, but instead, each member must deposit money to guarantee his orders. This money can be returned, once the member is no longer interested in the services of the cooperative. Only in the case of no pickup, does the cooperative take ownership of some of this money as a compensation.

This model, however, is only the default option in HomeCoop. If the field **Payment Method** is set to "At Pickup" the given member can order without any maximum or against real money deposited. Also, a member can have a virtual balance (effective in orders), that enforces maximum order as for any member, but have no real money deposited (the deposited sum is stored in a separate field than the effective balance). It is recommended to allow volunteering coordinators to pay only at pickup and without any deposited balance – either through virtual balance or through the "At Pickup" method.

Soon enough you'll find that you have too much cash than needed to pay for producers. That is why as a default a small risk is set to be taken by specifying **Payment Method** to "Up to Balance + % Extra" and setting **Percent Over Balance** to the percentage above the balance up to which members will be allowed to order.

The **Payment Method** and **Percent Over Balance** fields can also be overridden for a specific member order (in that order's header page), thus allowing you to be even more flexible with members sometimes.

Another payment method that can be defined for a member is the "Reduct from Balance" payment method. When this method is used, members pay from their real balance and enjoy no over-the-balance max order amounts. Be careful to use or stop using this method when there are open orders for the member that the member updated before and after this change – this may cause miscalculations in the exported cooperative order spreadsheets.

Products

Home → Products → Add (plus sign)

The product page offers several options to describe the product and its quality.

Descriptive fields

The **Product Name** and **Details** fields are textual fields to describe the product. Note that sometimes it is better to include the weight/volume of the product in its name, and set its measure in **Items**, so that members can simply order 1, 2, 3 and so on of it, and not **230gr.**, **460gr.**, **690gr.** and so on. **Details** is a long text field (3000 chars) that will normally contain the product's specification.

Measure

A product is measured first by its **Units** field, determining the measure method (weight, volume or quantity – and in what measuring unit). Notice that members will have to manually enter the amount in the units you specify here. If this is tiresome for a given product, simply define the product in **Units = Items**.

The **Quantity** field describes how much of the selected unit the product contains. For example: 10 lb. When **Units = Items** it is read-only and set automatically to 1.

Unit Interval denotes in what gaps can one order from the product. For example, a product of 10 lb. With Unit Interval of 10 will come in 10 lb., 20 lb. When **Units = Items** Unit Interval will normally be 1. Note that Unit Interval allows you to set partial orders (see Finalizing section).

Package Size is the size (in Units) in which the product is delivered from the producer. Sometimes products come only in large packages. A consumer cooperative can allow members to order only partial orders (see Finalizing section), if those orders amount to a multiply of the package size.

Items in Package, **Item Unit** and **Item Quantity** are used in conjunction in cases where you would like to show that a product is consisted of a few items. For example, 5X200oz. will appear as the product's size as a result of setting Item Unit to "Ounce", Item Quantity to 200 and Items in Package to 5.

Burden

This field can be very useful in measuring how much exactly is a delivery burdening – the pickup location or the cooperative order (or both). In most cases you will want this field to measure volume – so the cooperative order will get automatically locked when your fridge's capacity has been reached. Score each product according to how much place it takes in your fridge. Use a common product as your "1" score, and score all the others as either 0.5 of it, twice (2) of it, and so on.

Products Joining

Sometimes a producer may offer better price for larger quantities of the same product. A consumer cooperative can add up some smaller orders and replace them with a larger cost-saving order. This is done in HomeCoop by clicking once the **Join Products** button in the cooperative order's **Member Orders** page. The process can also be reversed by clicking the **Unjoin Products** button. It is best to perform this operation after a cooperative order has been locked. See the section on **Finalizing**.

To set Products Joining: set the **Join to Product** field in the smaller product to be the value of the larger product.

Pictures

Pictures upload requires write permissions on the uploading folder (see the installation guide).

Pickup Locations

Home → Pickup Locations → Add (plus sign)

Address and **Pickup Instructions** are displayed in the order screen, for all members. **Coordination Comments** is only displayed in the pickup location page itself.

The **Delivery Capacity** field of the pickup location defines how much "Burden" (see Products) can be put on the pickup location in terms of products ordered. In case of one pickup location per a cooperative order it is best to set the Delivery Capacity of the cooperative order to the exact same value as the pickup location's one. In this way the percentage that appears in the home page will actually reflect how much is the cooperative order full.

Storage Areas

Consider a case in which some products go to the fridge and some products go to the freezer – and you want to manage volume limits for both. In HomeCoop you can do that. The fridge and the freezer can be considered as different storage areas, defined in a certain pickup location – each with its own capacity. In the context of the cooperative order, each product will be assigned to a storage area. Initially, all products will be assigned to the pickup location default storage area, but that can be changed in the cooperative order product page. For each pickup location, a field is added in the cooperative order product page, where the storage area this product goes to is set.

This setting as many other settings, is copied every time you copy a cooperative order.

Cashier

Assuming you use the **Members Balance Model** (see above), you can monitor the state of your cashier(s) by updating how much money the cooperative has in each of its pickup locations. If some of the money is not stored in a pickup location but say, stored by a membership coordinator, you can setup an inactive pickup location (Setting **Status** to Inactive). The page **Cashier Totals** will show you the total amount of money members have in their real balance (regardless of any over-balance permissions or virtual balance) against the amount in all the cashiers.

Transactions

Transactions show you the history of changes in the amount of money of a real member's deposit or a pickup location cashier.

Transactions are only created indirectly – by either changing the member's real deposit or changing a pickup location cashier amount. In the member page, when you change the real balance and select a pickup location – upon save, a transaction that adds/removes money from both the member and the pickup location is created, and the pickup location cashier amount is updated accordingly. Transactions are also created in case of a "Reduct from Balance" member payment method.

Cooperative Orders

Home → Cooperative Orders → Add (plus sign)

Dates and Status

A cooperative order is open for member orders in the time between its **Opening** and **Closing** dates and times. It is only actually open when its **Status** is also set to "Active". **Delivery** date is mainly an informative field, displayed to all members. The status text of the order is changed according to it from "Closed" to "Arrived" or "Arriving Today".

Home Page Appearance

Only in an "Active" or a "Locked" **Status** does a cooperative order appear in the home page. Even then, only orders that has already started (according to their **Opening** value) appear in this page.

Orders appear only for the duration that they are open (meaning **Closing** time was not reached) – unless members participate in them. In such case, orders appear as long as the cooperative order is in **Status** "Active" or "Locked".

Thresholds

The **Delivery Capacity** field defines how much "Burden" (see Products) can be put on the cooperative order in terms of products ordered. A cooperative order can also be more roughly limited by a maximum sum of total money in cooperative prices – by the **Max. Coop Total** field or more accurately limited - by storage areas capacities.

Cooperative Fee

You can also set a cooperative fee for the order, in three ways:

- 1) Setting a fixed sum of money any ordering member must pay in **Cooperative Fee**.
- 2) Adding to the first method, setting a (normally) reduced amount of money for smaller orders, by setting the maximum amount that defines such "small order" in **Small Order Limit**, and setting its fixed reduced amount in **Small Order Cooperative Fee**.
- 3) Simply setting a percentage in **% Cooperative Fee**.

Note that if more than one method is used the methods supplement each other and not replace each other.

Cooperative Order Pickup Locations

A Cooperative Order → Pickup Locations → Add (plus sign)

Once you have setup the cooperative order header, it is time to move to define its Pickup Locations. Add the pickup location(s) that participate in this specific order. The pickup location's **Delivery Capacity** will be automatically copied, and you can override this value for the specific cooperative order. Here you can also set a total money limit

for the pickup location in **Max. Coop Total** or limit the order according to storage areas.

Saving the pickup location form will create a new tab row for the pickup location. This tab's pages show only data that is relevant to the pickup location. Only member orders are update-able through those pages. Products and Producers are only update-able at the cooperative order level (the topmost tab row).

Cooperative Order Producers

A Cooperative Order → Producers → Add (plus sign)

Setting the producers that participate in the cooperative order is normally the last step before you can go back to the cooperative order header and activate it by setting its **Status** to "Active" (and saving). Saving the form will result in copying all the products of the producer, allowing you to override some products table values (see Cooperative Order Products).

Delivery

After you have selected a producer that participates in this order, you can also set delivery costs for it: either a fixed price (in **Fixed Delivery Fee**) or a percentage (in **% Delivery Fee**). **Min Delivery Fee** and **Max Delivery Fee** are fixed amounts that define the minimum and maximum thresholds for a percentage. If the percentage, multiplied by the producer total, is less than **Min Delivery Fee**, then **Min Delivery Fee** is used. Otherwise, if the percentage, multiplied by the producer total, is less than **Max Delivery Fee**, then **Max Delivery Fee** is used. If **Fixed Delivery Fee** is defined, it overrides any other setting. **Min Delivery Fee** is also used when there's no value in **% Delivery Fee**. **Max Delivery Fee** is ignored if there's no value in both **% Delivery Fee** and **Min Delivery Fee**. In summary, there's no adding up of values, just a hierarchy between them in this order:

1. **Fixed Delivery Fee**
2. **Min Delivery Fee**, if **% Delivery Fee** is empty or **Producer Total** is too small
3. **Max Delivery Fee**, if **Producer Total** is too big
4. **% Delivery Fee** (multiplied by **Producer Total**)

Notice that when delivery sums are exported to spreadsheets the system does not take

into account a possible split in pickup locations in the same cooperative order, so the delivery total for the producer re-appears on each pickup location's spreadsheet. It is best to avoid such case, and instead to create separate cooperative order for each pickup location.

Cooperative Order Products

A Cooperative Order → Products

When a cooperative order product is created manually its values are copied from the products table. They can be overridden in the cooperative order product page for the specific cooperative order. To deactivate a product from a specific order, change its status to inactive A product can also be re-activated. Note that after member orders have been placed in a cooperative order, deactivating a product also deletes the corresponding order items in the member orders and updates totals accordingly.

Member Orders

Member orders are either modified by the members themselves (from the home page), or by a coordinator, through the cooperative order Member Orders page or a specific pickup location's view of that cooperative order.

When an order item is modified by a coordinator, the member can see the line modified, including its original quantity value, if exists.

The column "Add" in the order items page allows members to specify "how high can they go" in a partial order. A partial order is an order when members can only order part of the product as it is provided by the producer (see more on the Finalizing section).

Members can also leave comments in each order item or in the order's header. These comments are readable for coordinators from the Member Orders page.

Cooperative Order Copy

Home → Copy Coop. Order → Copy

Instead of going through the above steps each time you have to setup an order, you can simply copy a previous order settings. The copy is done without member orders.

The field **Prices Source** allows you to either take prices from the original (previous) order, which is the default, or directly from the products table.

Take note of the dates of the new order – these are the dates in which you'll need to take action – finalize an order or receive it.

Note that by default after copying an order it will be created in “Draft” **Status**. You can set it to “Active” **Status** even before the copy, so it will be appear open in the home page immediately.

Finalizing

Finalizing a cooperative order should be done when the cooperative order's end date has been reached, or, more actively, after setting its **Status** to “Locked” (and saving). Notice that reductions can also be made on a full cooperative order that is still open according to its dates and status.

The process of finalizing a cooperative order consists of three phases:

- 1) Check **Partial Orders** (if used)
- 2) **Join Products** (if used)
- 3) **Export Data** into spreadsheets (and email list) and send it to producers and pickup location coordinators.

Partial Orders

A partial order is an order in which members can only order part of the whole product as it is provided by the producer. The ability to make partial orders is activated in the **Product's** page (see the section on **Products**). Once you have activated partial orders for a given product you may want to check if the orders add up to whole package sizes. For this, go to the cooperative order's **Products** page. The column **Quantity** will have red cells for each product that doesn't have whole package sizes. Furthermore, clicking on this red number will lead you to a pop-up Partial Orders page.

This pop-up page only makes a suggestion how to correct the problem. You must make the actual changes in the members orders manually. You may succeed in doing so if members entered values in the **Add** field of the order items page. The suggestion is first to add products to those who ordered last. The pop-up also provides useful

links to the members orders – navigating in the underlying window to those orders while leaving the Partial Orders page open on the separate pop-up page.

If this method did not help you, you may want to contact the members and ask them what to do – or, more simply, cancel the latest orders. Each member order header contains the email addresses of that member. If you wish to send an email to all ordering members of specific product(s): In the cooperative order's **Export Data** page select the option "E-mails of Specific Products' Ordering Members". Mark the products that has a partial orders issue, and the **Display List** button will show you the e-mail addresses of those who ordered them.

Notice that the problem of Partial Orders takes even a bitter turn when there is more than one pickup location in the same cooperative order. It is best to avoid such case, and instead, to create a separate cooperative order for each pickup location.

Join Products

If you used **Products Joining** (see the sub-section in **Products** above), when finalizing a cooperative order go to its **Member Orders** page and click the **Join Products** button. The system will tell you if joining was done and on which member orders. Joining products will reduce both producer and cooperative prices, thus saving money to the cooperative members. In the exported spreadsheet for the pickup location it would still appear that the member has ordered the small size ze actually ordered, but with less money to pay for it, while in the producer's spreadsheet it would only appear that larger products were ordered.

Notice that products joining does not take into account a possible split in pickup locations in the same cooperative order. It is best to avoid such case, and instead, to create a separate cooperative order for each pickup location.

Export Data

After the cooperative order has been locked and partial orders and products joining have been handled, it is time to export the data using the cooperative order's **Export Data** page – and send it to the producers and pickup locations coordinators.

This page also offers export of all the emails in of ordering members, or in relation to specific producer/product(s)/pickup location.

Simply select the **Data Set** that suits you the most.

Archiving a Cooperative Order (or Cancelling it)

When you wish that a cooperative order won't appear any more in the home page, since all members already got their goods – it is time to archive it. Go to the cooperative order header, change the **Status** to **Closed** and save.

If for some reason, the cooperative order was cancelled, change the **Status** to **Cancelled** and save.

Member Roles

HomeCoop comes with the following predefined member roles. A member can have more than one role. Roles only add permissions, so if a member is both a Pickup Location Coordinator and a System Administrator ze will enjoy the full permissions of a system administrator and the more restricted set of permissions of the Pickup Location Coordinator will be ignored.

Member

The regular member role, with permissions to view or modify only one's own orders.

System Administrator

Full permissions.

Cooperative Chief Coordinator

Almost full permissions, except, notably the permission to set other people's roles. Still, it is possible with this role to create new regular members (with the Member role) and to either **Remove Permissions** to regular members or **Restore Permissions** to members without permissions.

Cooperative Order Coordinator

A full permission to handle a cooperative order cycle, providing the member was set as a coordinator of that order (see Coordination below).

Pickup Location Coordinator

Permissions to edit/view data related to pickup locations that the member was set as a coordinator of (see Coordination below) - in a **Cooperative Order**. Permission to edit such **Pickup Locations**.

Membership Coordinator

Permissions to edit/view all pickup locations and members. This role can be used to monitor the cooperative cashier(s).

Producer

View only user – able to see (and export) only summaries of producers the member with this role was set as coordinator of (see Coordination below) and not any member data.

Producer Coordinator

Like Cooperative Order Coordinator, but also with permissions to update products and producers data – providing the member was set as their coordinator (see Coordination below).

Coordination

Permissions to cooperative orders, pickup locations and producers may be given per record, thus ensuring coordinators don't interfere in each other's work. Each grid of these entities, as well as the topmost tab row of the cooperative order, have a **Coordination** link.

In this page you can create groups of coordinators that are responsible and thus have access to a given cooperative order, pickup location or producer.

You can also reuse the same group you once created for different records (changing the selected radio button).

The **Is Contact Person** field is used in the order page to display names and emails of the members to contact in regard to the selected pickup location or the entire cooperative order. They are called in the order page “**Order Coordinator(s)**” and

"Pickup Location Coordinator(s)".

Whenever a member with a record-level permission creates a producer, a pickup location or a cooperative order, Coordination is automatically set for the created record with the creator as sole coordinator.

The **Cooperative Order Copy** function also copies Coordination from the source to the newly created order, so these settings are only done once per a cooperative order succession.