**Product Roster**

**(Retool App)**

**User Guide**

Table of Contents

[Executive Summary 3](#_Toc193361407)

[Data 4](#_Toc193361408)

[Raw Ingredient 4](#_Toc193361409)

[Add Raw Ingredient 4](#_Toc193361410)

[Upload Raw Ingredient csv file 5](#_Toc193361411)

[Modify Raw Ingredient 7](#_Toc193361412)

[Recipe Builder 9](#_Toc193361413)

[Add Recipe Builder 9](#_Toc193361414)

[Upload Recipe Builder csv file 10](#_Toc193361415)

[Modify Recipe Build 12](#_Toc193361416)

[Recipe 13](#_Toc193361417)

[Add Recipe 13](#_Toc193361418)

[Upload Recipe csv file 14](#_Toc193361419)

[Modify Recipe 15](#_Toc193361420)

[Menu Item Builder 16](#_Toc193361421)

[Add Menu Item Builder 16](#_Toc193361422)

[Upload Menu Item Builder csv file 17](#_Toc193361423)

[Modify Menu Item Build 19](#_Toc193361424)

[Menu Item 20](#_Toc193361425)

[Add Menu Item 20](#_Toc193361426)

[Upload Menu Item csv file 21](#_Toc193361427)

[Modify Menu Item 23](#_Toc193361428)

[App Features 24](#_Toc193361429)

[Download 24](#_Toc193361430)

[Filter 26](#_Toc193361431)

[Search for a Corporation Rebate / Assignment 28](#_Toc193361432)

[Sort 30](#_Toc193361433)

[Developer Notes 31](#_Toc193361434)

[Changes to the Data 31](#_Toc193361435)

# Executive Summary

The Product Roster (Retool App) User Guide is designed to help the user understand how to navigate and use the features within the Product Roster app. The user guide showcases how to add and modify data within the Product Roster app, as well as how to filter, sort, and download data within the Product Roster app. The user guide also lists important notes from the developer that the user should be aware of when interacting with the Product Roster app.

The Product Roster app is designed to allow internal Krispy Krunchy employees to add and modify the Product Roster information that is utilized within multiple dashboards in Power BI.

# Data

Product Roster app contains 5 datasets: Raw Ingredient, Recipe Builder, Recipe, Menu Item Builder, and Menu Item. The Product Roster app allows the user to add, modify and remove data within each of the 5 datasets, that will then be utilized within multiple dashboards in Power BI.

## Raw Ingredient

The Raw Ingredient data is a list of products (raw ingredients), sold by Sysco, that a KKC operator can order from Sysco to be use in creating recipes and menu items.

### Add Raw Ingredient

To add new raw ingredients that will be utilized within multiple dashboards, you can use the **Add Raw Ingredient** feature within the Product Roster app, which adds new raw ingredient records, one at a time.

Here is how to utilize the **Add Raw Ingredient** feature within the Product Roster app:

**Step 1:** Select **Raw Ingredient** at the top of the table

**Step 2:** Select **Add Raw Ingredient**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Add A New Raw Ingredient** form will appear. Fill out the form with the details of the new raw ingredient

**Step 4**: Click **Add**

**A screenshot of a computer

AI-generated content may be incorrect.**

### Upload Raw Ingredient csv file

To add multiple new raw ingredients that will be utilized within multiple dashboards, you can use the **Upload CSV** feature within the Product Roster app, which adds one or more new raw ingredient records.

Here is how to utilize the **Upload CSV** feature within the Product Roster app:

**Step 1:** Select **Raw Ingredient** at the top of the table

**Step 2:** Select **Upload CSV**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Upload Raw ingredient csv File** form will appear. Select **Select or drag and drop**

**Step 4:** Select the csv file that you wish to upload

* *Note: Be sure to follow the* ***Instructions for uploading new raw ingredients*** *section*

**Step 4**: Click **Upload**

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

### Modify Raw Ingredient

To modify existing raw ingredients that are being utilized within multiple dashboards, you can use the **Modify Raw Ingredient** feature within the Product Roster app, which modifies existing raw ingredient records, one at a time.

Here is how to utilize the **Modify Raw Ingredient** feature within the Product Roster app:

**Step 1:** Select **Raw Ingredient** at the top of the table

**Step 2:** Select the raw ingredient record that you wish to modify from the table

**Step 3:** Select **Modify Raw Ingredient**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 4:** The **Modify Raw Ingredient** form will appear. Fill out the form with the new details of the existing raw ingredient

**Step 5**: Click **Update**

A screenshot of a computer

AI-generated content may be incorrect.

## Recipe Builder

The recipe builder data is a list of recipes, along with the raw ingredient(s) and quantities that make up each recipe. Each recipe can contain one or more raw ingredient.

### Add Recipe Builder

To add new recipe builds that will be utilized within multiple dashboards, you can use the **Add Recipe Build** feature within the Product Roster app, which adds new recipe builds, one at a time.

Here is how to utilize the **Add Recipe Build** feature within the Product Roster app:

**Step 1:** Select **Recipe Builder** at the top of the table

**Step 2:** Select **Add Recipe Build**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Add A New Recipe Build** form will appear. Fill out the form with the details of the new recipe build

**Step 4**: Click **Add**

A screenshot of a computer

AI-generated content may be incorrect.

### Upload Recipe Builder csv file

To add multiple new recipe builds that will be utilized within multiple dashboards, you can use the **Upload CSV** feature within the Product Roster app, which adds one or more new recipe build records.

Here is how to utilize the **Upload CSV** feature within the Product Roster app:

**Step 1:** Select **Recipe Builder** at the top of the table

**Step 2:** Select **Upload CSV**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Upload Recipe Builder csv File** form will appear. Select **Select or drag and drop**

**Step 4:** Select the csv file that you wish to upload

*\*\*\* Note: Be sure to follow the* ***Instructions for uploading new recipe builds*** *section*

**Step 4**: Click **Upload**

A screenshot of a computer

AI-generated content may be incorrect.

A white rectangular object with black text

AI-generated content may be incorrect.

### Modify Recipe Build

To modify existing recipe builds that are being utilized within multiple dashboards, you can use the **Modify Recipe Build** feature within the Product Roster app, which modifies recipe build records, one at a time.

Here is how to utilize the **Modify Recipe Build** feature within the Product Roster app:

**Step 1:** Select **Recipe Builder** at the top of the table

**Step 2:** Select the recipe build record that you wish to modify from the table

**Step 3:** Select **Modify Recipe Build**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 4:** The **Modify Recipe Build** form will appear. Fill out the form with the details of the existing recipe build

**Step 5**: Click **Update**

A screenshot of a computer

AI-generated content may be incorrect.

## Recipe

The recipe data is a list of recipes.

### Add Recipe

To add new recipes that will be utilized within multiple dashboards, you can use the **Add Recipe** feature within the Product Roster app, which adds new recipes, one at a time.

Here is how to utilize the **Add Recipe** feature within the Product Roster app:

**Step 1:** Select **Recipe** at the top of the table

**Step 2:** Select **Add Recipe**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Add A New Recipe** form will appear. Fill out the form with the details of the new recipe

**Step 4**: Click **Add**

A screenshot of a computer

AI-generated content may be incorrect.

### Upload Recipe csv file

To add multiple new recipes that will be utilized within multiple dashboards, you can use the **Upload CSV** feature within the Product Roster app, which adds one or more new recipe records.

Here is how to utilize the **Upload CSV** feature within the Product Roster app:

**Step 1:** Select **Recipe** at the top of the table

**Step 2:** Select **Upload CSV**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Upload Recipe csv File** form will appear. Select **Select or drag and drop**

**Step 4:** Select the csv file that you wish to upload

*\*\*\* Note: Be sure to follow the* ***Instructions for uploading new recipes*** *section*

**Step 4**: Click **Upload**

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

### Modify Recipe

To modify existing recipes that are being utilized within multiple dashboards, you can use the **Modify Recipe** feature within the Product Roster app, which modifies recipe records, one at a time.

Here is how to utilize the **Modify Recipe** feature within the Product Roster app:

**Step 1:** Select **Recipe** at the top of the table

**Step 2:** Select the recipe record that you wish to modify from the table

**Step 3:** Select **Modify Recipe**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 4:** The **Modify Recipe** form will appear. Fill out the form with the details of the existing recipe

**Step 5**: Click **Update**

A blue and white screen with white text

AI-generated content may be incorrect.

## Menu Item Builder

The menu item builder data is a list of menu items, along with the raw ingredient(s) / recipes and quantities that make up each menu item. Each menu item build can contain one or more raw ingredients / recipes.

### Add Menu Item Builder

To add new menu item builds that will be utilized within multiple dashboards, you can use the **Add Menu Item Build** feature within the Product Roster app, which adds new menu item builds, one at a time.

Here is how to utilize the **Add Menu Item Build** feature within the Product Roster app:

**Step 1:** Select **Menu Item Builder** at the top of the table

**Step 2:** Select **Add Menu Item Build**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Add A New Menu Item Build** form will appear. Fill out the form with the details of the new menu item build

**Step 4**: Click **Add**

A screenshot of a computer

AI-generated content may be incorrect.

### Upload Menu Item Builder csv file

To add multiple new menu item builds that will be utilized within multiple dashboards, you can use the **Upload CSV** feature within the Product Roster app, which adds one or more new menu item build records.

Here is how to utilize the **Upload CSV** feature within the Product Roster app:

**Step 1:** Select **Menu Item Builder** at the top of the table

**Step 2:** Select **Upload CSV**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Upload Menu Item Builder csv File** form will appear. Select **Select or drag and drop**

**Step 4:** Select the csv file that you wish to upload

*\*\*\* Note: Be sure to follow the* ***Instructions for uploading new menu item builds*** *section*

**Step 4**: Click **Upload**

A screenshot of a computer

AI-generated content may be incorrect.

A white screen with black text

AI-generated content may be incorrect.

### Modify Menu Item Build

To modify existing menu item builds that are being utilized within multiple dashboards, you can use the **Modify Menu Item Build** feature within the Product Roster app, which modifies menu item build records, one at a time.

Here is how to utilize the **Modify Menu Item Build** feature within the Product Roster app:

**Step 1:** Select **Menu Item Builder** at the top of the table

**Step 2:** Select the menu item build record that you wish to modify from the table

**Step 3:** Select **Modify Menu Item Build**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 4:** The **Modify Menu Item Build** form will appear. Fill out the form with the details of the existing menu item build

**Step 5**: Click **Update**

A screenshot of a computer

AI-generated content may be incorrect.

## Menu Item

The menu item data is a list of menu items, along with the pricing tiers that make up each menu item.

### Add Menu Item

To add new menu items that will be utilized within multiple dashboards, you can use the **Add Menu Item** feature within the Product Roster app, which adds new menu items, one at a time.

Here is how to utilize the **Add Menu Item** feature within the Product Roster app:

**Step 1:** Select **Menu Item** at the top of the table

**Step 2:** Select **Add Menu Item**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Add A New Menu Item** form will appear. Fill out the form with the details of the new menu item

**Step 4**: Click **Add**

A screenshot of a computer

AI-generated content may be incorrect.

### Upload Menu Item csv file

To add multiple new menu items that will be utilized within multiple dashboards, you can use the **Upload CSV** feature within the Product Roster app, which adds one or more new menu item records.

Here is how to utilize the **Upload CSV** feature within the Product Roster app:

**Step 1:** Select **Menu Item** at the top of the table

**Step 2:** Select **Upload CSV**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 3:** The **Upload Menu Item csv File** form will appear. Select **Select or drag and drop**

**Step 4:** Select the csv file that you wish to upload

*\*\*\* Note: Be sure to follow the* ***Instructions for uploading new menu items*** *section*

**Step 4**: Click **Upload**

A screenshot of a computer

AI-generated content may be incorrect.

A screen shot of a computer

AI-generated content may be incorrect.

### Modify Menu Item

To modify existing menu items that are being utilized within multiple dashboards, you can use the **Modify Menu Item** feature within the Product Roster app, which modifies menu item records, one at a time.

Here is how to utilize the **Modify Menu Item** feature within the Product Roster app:

**Step 1:** Select **Menu Item** at the top of the table

**Step 2:** Select the menu item record that you wish to modify from the table

**Step 3:** Select **Modify Menu Item**

A screenshot of a computer

AI-generated content may be incorrect.

**Step 4:** The **Modify Menu Item** form will appear. Fill out the form with the details of the existing menu item

**Step 5**: Click **Update**

A screenshot of a computer

AI-generated content may be incorrect.

# App Features

Aside from adding and modifying data within the Product Roster app, you will find additional features that allow you to download, filter, search and sort the data within the Product Roster app.

## Download

To download the Raw Ingredient, Recipe Builder, Recipe, Menu Item Builder, or Menu Item data that is being utilized within multiple dashboards, you can use the **Download** feature within the Product Roster app, which downloads a csv file containing the entire dataset for either the Raw Ingredient, Recipe Builder, Recipe, Menu Item Builder, or Menu Item data.

Here is how to utilize the **Download** feature within the Product Roster app:

**Step 1:** Select either: **Raw Ingredient**, if you wish to download the raw ingredient data, **Recipe Builder**, if you wish to download the recipe builder rebate data, **Recipe**, if you wish to download the recipe data, **Menu Item Builder**, if you wish to download the menu item builder data, or **Menu Item**, if you wish to download the menu item data, at the top of the table

**Step 2:** Select **Download**

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

## Filter

To filter the Raw Ingredient, Recipe Builder, Recipe, Menu Item Builder, or Menu Item data that is being utilized within multiple dashboards, you can use the **Filter** feature within the Product Roster app, which filters the entire dataset for either the Raw Ingredient, Recipe Builder, Recipe, Menu Item Builder, or Menu Item data.

Here is how to utilize the **Filter** feature within the Product Roster app:

**Step 1:** Select either: **Raw Ingredient**, if you wish to filter the raw ingredient data, **Recipe Builder**, if you wish to filter the recipe builder rebate data, **Recipe**, if you wish to filter the recipe data, **Menu Item Builder**, if you wish to filter the menu item builder data, or **Menu Item**, if you wish to filter the menu item data, at the top of the table

**Step 2:** Select **Filter**

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

## Search for a Corporation Rebate / Assignment

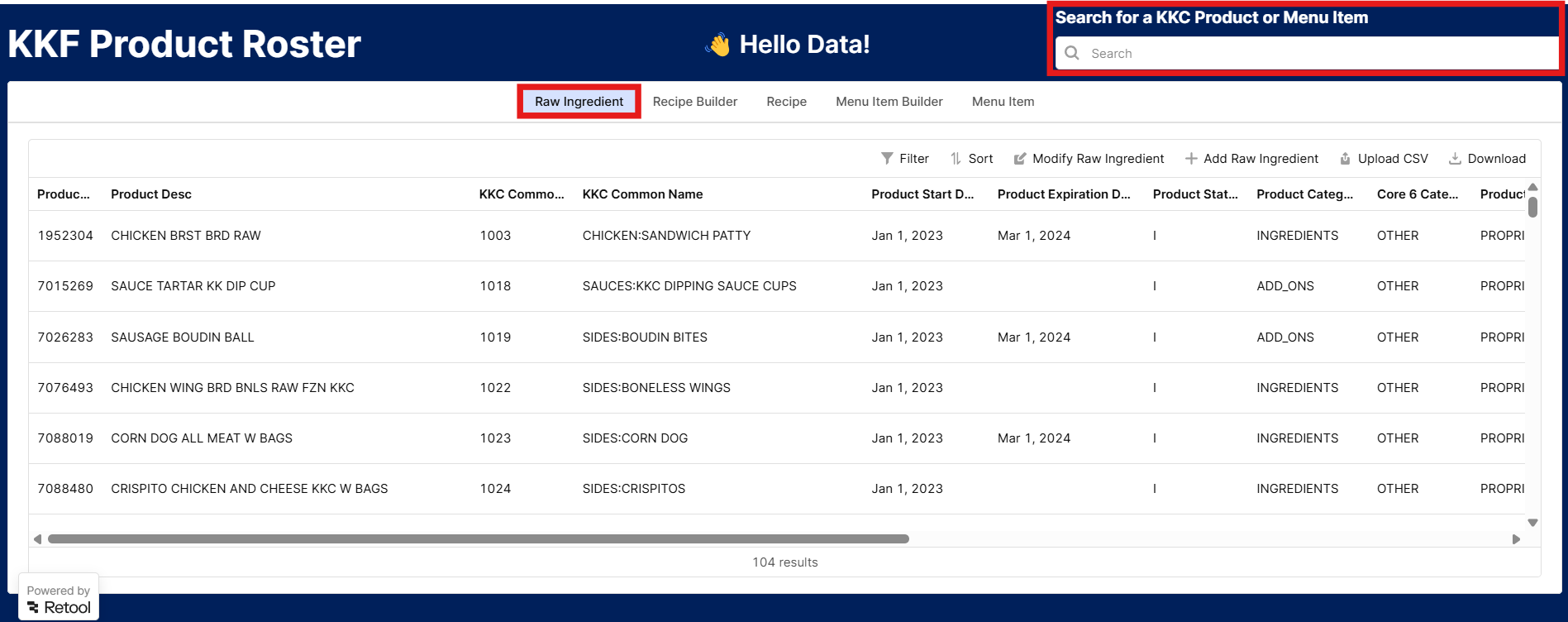
To search the Raw Ingredient, Recipe Builder, Recipe, Menu Item Builder, or Menu Item data that is being displayed, you can use the **Search** feature within the Product Roster app, which searches the entire dataset for either the Raw Ingredient, Recipe Builder, Recipe, Menu Item Builder, or Menu Item data.

Here is how to utilize the **Search** feature within the Product Roster app:

**Step 1:** Select either: **Raw Ingredient**, if you wish to search the raw ingredient data, **Recipe Builder**, if you wish to search the recipe builder rebate data, **Recipe**, if you wish to search the recipe data, **Menu Item Builder**, if you wish to search the menu item builder data, or **Menu Item**, if you wish to search the menu item data, at the top of the table

**Step 2:** Type the value that you wish to find within the desired dataset.

*\*\*\* Note: The search bar searches for your value across all fields within the desired dataset*



A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

## Sort

To sort the Raw Ingredient, Recipe Builder, Recipe, Menu Item Builder, or Menu Item data that is being displayed, you can use the **Sort** feature within the Product Roster app, which sorts the entire dataset for either the Raw Ingredient, Recipe Builder, Recipe, Menu Item Builder, or Menu Item data.

Here is how to utilize the **Sort** feature within the Product Roster app:

**Step 1:** Select either: **Raw Ingredient**, if you wish to sort the raw ingredient data, **Recipe Builder**, if you wish to sort the recipe builder rebate data, **Recipe**, if you wish to sort the recipe data, **Menu Item Builder**, if you wish to sort the menu item builder data, or **Menu Item**, if you wish to sort the menu item data, at the top of the table

**Step 2:** Select **Sort**

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

A screenshot of a computer

AI-generated content may be incorrect.

# Developer Notes

## Changes to the Data

Any changes to the data, whether you add new records, or modify existing records, will **immediately** be shown within the Product Roster app.

However, these changes will not be reflected within each dashboard **until 4:00 AM EST the next day**.