**Rewritten & Updated Operational Workflow**

This document outlines the comprehensive workflow for the bread tracking system. The process tracks both commercial dispatches to clients like the Spar DC and the subsequent Corporate Social Investment (CSI) activities. The CSI goal is to redistribute a quantity of bread equivalent to 5.9% of the initial commercial dispatch volume.

The system uses unique batch references for all operations: **Dispatch Orders (DO)** for commercial sales and **Donation Batches (DN)** for CSI redistribution.

**1. Primary Production and Dispatch (Primary Hub)**

This function covers the initial, large-scale production of fresh bread and its distribution to the Spar DC, managed via formal Dispatch Orders.

**Production & Dispatch Operator (Primary Hub)**

This team member is responsible for the hands-on baking and preparation of products. They use the mobile application to log all newly produced bread.

**Application Workflow:**

* **Authentication:** Log in to the mobile application using their assigned email and password.
* **Daily Production Scanning:** Scan the QR code on each crate and input the quantity of fresh bread loaves. Scanned crates are automatically associated with the active Dispatch Order for that day's shipment to the Spar DC.
* **Data Submission:** Submit the data to update Zoho Inventory in real-time.
* **End of Day:** Review the daily activity summary in the app and log out.
* **Offline Capability:** The app stores data locally without an internet connection and syncs automatically when connectivity is restored.

**Logistics & Dispatch Coordinator**

This role oversees the administrative aspects of the primary dispatch process, ensuring all goods are correctly accounted for under a specific Dispatch Order before shipment.

**Application Workflow:**

* **Dispatch Order Management:**
  + In Zoho, create a unique **Dispatch Order** reference for each shipment (e.g., DO20250523-A).
  + Oversee the real-time assignment of scanned crates to the active Dispatch Order.
  + Before shipment, verify that the total quantity of bread in the assigned crates matches the order requirements for the Spar DC.
  + Finalize and "close" the Dispatch Order in the system upon shipment. This creates the official commercial record.
* **User Management:** Create and manage mobile app accounts for the Production & Dispatch Operators at the primary hub.
* **Reporting:** Generate reports on production output and finalized Dispatch Orders.

**2. Reverse Logistics and CSI Fulfillment**

This function manages the collection of surplus bread and the production of any shortfall to meet the 5.9% donation target, which is calculated from the volume of the finalized Dispatch Orders.

**CSI Field Worker**

This team member visits retail stores on the product's "best before" date to collect unsold bread, using the mobile application to log all uplifted stock.

**Application Workflow:**

* **Authentication:** Log in to the mobile application.
* **Upliftment Scanning:** At each retail store, scan the QR code for each crate, input the quantity of uplifted bread, and note any damaged items.
* **Data Submission:** Submit the data to update Zoho Inventory with the quantity of "Uplifted Stock."

**Production Operator (THFC Hub)**

Based at the THFC secondary production hub, this team member is responsible for baking bread specifically to cover donation shortfalls as directed by the Zoho Super Admin.

**Application Workflow:**

* **Receive Production Order:** Receives instructions from the Zoho Super Admin detailing the exact quantity of bread to bake.
* **Production Scanning:** After baking, uses the mobile application to scan crates and input the quantity of bread produced. This is logged in Zoho Inventory as "THFC-Baked Stock."

**3. System, Data, and CSI Oversight (THFC Head Office)**

This central function, led by the Zoho Super Admin, provides the administrative and technological backbone for all operations and directly manages the entire CSI donation process.

**Zoho Administrator (Super Admin)**

The Super Admin has comprehensive oversight of all operational data. From the THFC Head Office, they not only manage the system's technical aspects but also execute all administrative tasks related to the CSI program.

**Application Workflow:**

* **CSI Target Management and Fulfillment:**
  + **Reconciliation & Shortfall Calculation:** After CSI Workers complete collections, the Super Admin reconciles the total "Uplifted Stock" in Zoho. They compare this total against the 5.9% donation target, which is based on the total volume of **finalized Dispatch Orders** sent to the Spar DC.
  + **Initiate THFC Production:** If a shortfall exists, the Super Admin issues a production order to the THFC Hub Production Operator to bake the exact amount of bread needed.
  + **Donation Batch Creation:** Create unique **Donation Batch** references (e.g., DN20250524-A).
  + **Source and Allocation Tracking:** Assign both "Uplifted Stock" and "THFC-Baked Stock" to the appropriate Donation Batch. They then allocate these batches to recipient organizations, ensuring allocation percentages (e.g., 40% Food Forward SA, 60% SA Harvest) are correctly applied.
  + **Donation Reporting and Valuation:** Generate detailed donation reports by date, source, and recipient. Calculate the financial value of donations and export reports for stakeholders.
* **System and Data Administration:**
  + **System Configuration:** Manage API credentials, Zoho Inventory custom fields, item categories (e.g., Uplifted Stock, THFC-Baked Stock), and warehouse locations.
  + **Data Validation:** Perform regular data audits across all Dispatch Orders and Donation Batches to ensure end-to-end data integrity.
  + **Comprehensive User Management:** Create and manage accounts and permissions for all roles across all locations.