

# Product Management



This document will cover the required information needed for setting up new product(s) or changes that can be done to existing products.

## **Can I change or delete a product after it's been created?**

Yes, once a product has been created you can edit it by locating the product in the list of products or using the search feature to find it and then clicking edit for that product. You can only delete a product after it's been created if it does not have any transaction history on it.

## **The product isn't showing in the list or when I search, where is it?**

If you are not seeing your product, it might have passed its end date and you will need to check the Include Inactive box and hit search again in order to see it.

## **Is there a quicker way to make the same product with a different price, fund account, etc...?**

Once you have a product setup, you can click edit on it and then click the Copy button at the bottom. The system will let you know once it's made a copy and you can then make any changes you need before saving the new, copied version of the product.

## **How do I add or manage my product(s)?**

1. Log into your OSP account and choose the following menu:

### **Transactions >> OSP Products**

OSP Products								
<input type="text" value="Search Activity Number, N"/>		<input type="checkbox"/> Include Inactive	<button>Q Search</button>	<button>▼ Additional Filters</button>	<button>▲ Clear Filters</button>	<button>+ Activity/Obligation</button>		
Activity No	Activity Name	Price	Sponsor/Teacher	Start Date	End Date	Account No	Active	
ZY986-25	Agenda Planner	\$10.00	zbaker@edlio.com	05/21/2019	07/01/2022	0007	<input checked="" type="checkbox"/>	<button>Edit</button> <button>Delete</button>
ZY986-73	Field Trip to Museum	\$20.00	zbaker@edlio.com	01/06/2020	03/31/2022	0005	<input checked="" type="checkbox"/>	<button>Edit</button> <button>Delete</button>
ZY986-428	Football Game Ticket	\$10.00	zbaker@edlio.com	01/25/2021	01/25/2022	0006	<input checked="" type="checkbox"/>	<button>Edit</button> <button>Delete</button>
ZY986-VAR35	General Donation	\$0.00	zbaker@edlio.com	01/16/2020	01/16/2099	0010	<input checked="" type="checkbox"/>	<button>Edit</button> <button>Delete</button>

*Example: OSP Products Page*

2. Click **Add Activity/Obligation** in the right corner on the OSP Products page.

+ Activity/Obligation

3. **OSP Products - Required Fields** - The minimum information needed to create a product.
- Activity Name
  - Activity Short Description
  - Sponsor/Teacher Email Address - Type in or use Magnifying Glass\*
  - Sponsor/Teacher Last Name - Type in\*
  - Sponsor/Teacher First Name - Type in\*
  - Dates Available for Sale - Online and Offline Dates
  - Price Type
    - Fixed Price - Set dollar amount
    - Variable Price - Open dollar amount.
    - Obligation - please refer to Obligation Product Instructions
  - Price - For fixed price, enter dollar amount; variable will grey out to allow purchaser to choose amount
  - Fund Account - Type in or use Magnifying Glass\*
  - Fund Account Description - Type in\*
  - Grade Level
- \* Note - Information will autofill in it is already in the system

Required Fields Additional Options Additional Text Fields Product Image

Activity Number

A - Activity Name Donation ✓

B - Activity Short Description Donation for School ✓  
503 characters remaining

C - Sponsor/Teacher Email support@osmsinc.com ✓ 🔍

D - Sponsor/Teacher Last Name Support Team ✓

D - Sponsor/Teacher First Name OSMS ✓

F - Dates Available for Sale 10/06/2021 ✓ To 10/06/2021 ✓

G - Price Type ☐ Fixed ☒ Variable ☐ Obligation

H - Price 0.00 ✓

I - Fund Account 0010 ✓ 🔍

J - Fund Account Description Donations ✓  
91 characters remaining

K - Grade Level N/A ✓

*Example: OSP Product Required Fields*

4. **OSP Products - Additional Options** - The additional options for adding different features to your products. Please refer to Product Additional Options instructions for additional information.
- a. No StudentID Required - purchaser will not have to assign a student profile; enables guest checkout in OSP Store.
  - b. Taxable - opens up the Transactions for Taxable Items Only report.
  - c. Item Text Input from Purchaser - adds description text box to fixed price items.
  - d. Disable Requirement to Enter a Description - removes description text box on variable price products. *\*Only shows after selecting variable price*
  - e. Allow OTR Price Override - OTR users can change the price
  - f. Ticketed Item - Please refer to OTM Instructions
  - g. OMS Sales Allowed - Please refer to OMS instructions
  - h. Recurring Payments - recurring payments draft monthly from purchaser card, until product is inactive
  - i. Employee Only Purchase

### Additional Options

- ☐ No Student ID Required
- ☐ Taxable
- ☐ Item Text Input from Purchaser
- ☐ Disable Requirement to Enter a Description
- ☐ Allow OTR Price Override
- ☐ Ticketed Item
- ☐ OMS Sales Allowed
- ☐ Recurring Payments
- ☐ Employee Only Purchase

*Example of Additional Options screen*

## Purchase Requirements

- j. Verify Grade Level
- k. Minimum GPA
- l. Max Quantity Per Student
- m. Blocker Obligation
- n. Detailed Obligation Only
- o. Restricted if Any Obligation Exists
- p. Restricted if Blocker Obligation Exists
- q. Student Must be in Product's Group
- r. Student Must be in Product's School

## OTR Restrictions - please refer to OTR Product Instructions

- s. OTR User Only - Product will only show in Receipt Entry

## Activity Inventory -

- t. Limited Quantity Item - Quantity Available must be set via Inventory Quantity Adjustments after completing item setup

Purchase Requirements	
<input type="checkbox"/> Verify Grade Level	<input type="text" value="0.00"/>
<input type="checkbox"/> Minimum GPA	<input type="text" value="0.00"/>
<input type="checkbox"/> Max Quantity Per Student	<input type="text"/>
<hr/>	
<input type="checkbox"/> Blocker Obligation	<input type="checkbox"/> Restricted if Any Obligation Exists
<input type="checkbox"/> Detailed Obligation Only	<input type="checkbox"/> Restricted if Blocker Obligations Exists
<hr/>	
<input type="checkbox"/> Student Must be in Product's Group	
<input type="checkbox"/> Student Must be in Product's School	
<hr/>	
OTR Restrictions	
<input type="checkbox"/> OTR User Only	
<hr/>	
Activity Inventory	
<input type="checkbox"/> Limited Quantity Item	

*Example of Additional Options screen*

## 5. **OSP Products - Additional Text Fields**

- a. Date Activity Starts
- b. Course/Class
- c. Event Code
- d. Long Description
- e. Item Cost
- f. User Defined 1 & 2
- g. Item Terms & Conditions

**Additional Text Fields**

Date Activity Starts

Course/Class

Event Code

Long Description

Item Cost

Other Expenses

Item Discount Price Level 1 (Discounted)

Item Discount Price Level 2 (Lowest Price)

User Defined 1

User Defined 2

Item Terms & Conditions

☐ Disable

☐ Optional


☒ Required

Must go to and fill out field trip permission form. [Click here for Form](https://forms.gle/F65Sdi18Vwfb89WW7)

*Example of Additional Text Fields screen*

6. **OSP Products - Product Image** - Click Choose File
  - a. Use JPG, GIF, or PNG formatted images

Product Image



Select or drop your image file here

File will be resized and compressed when saved  
Accepted file types: jpeg, jpg, gif, png, bmp

*Example of Product Image screen*

7. Click **Save** or **Update**