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 it's end date and you will need to check the Include Inactive box and hit search again in order to see it.

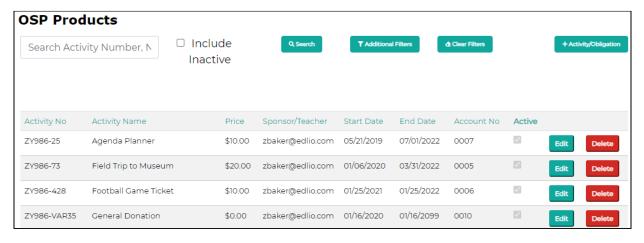
Is there a quicker way to make the same product with a different price, fund account, etc...?

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

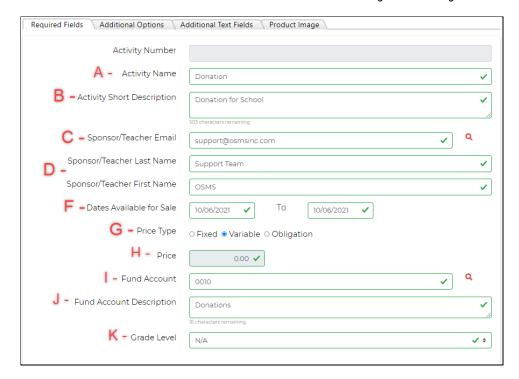


Example: OSP Products Page

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



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



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

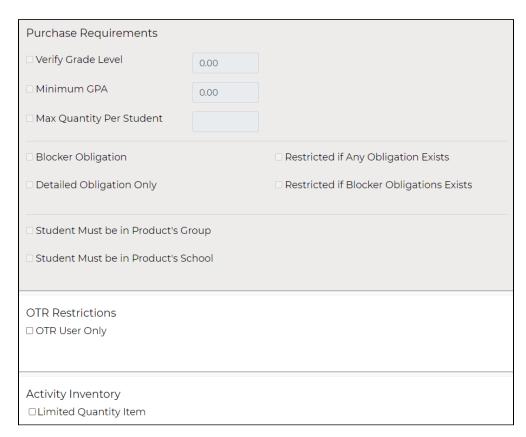
- j. Verify Grade Level
- k. Minimum GPA
- I. Max Quantity Per Student
- m. Blocker Obligation
- n. Detailed Obligation Only
- o. Restricted if Any Obligation Exists
- p. Restricted if Blocker Obligation Exists
- q. Student Must be in Product's Group
- r. Student Must be in Product's School

OTR Restrictions - please refer to OTR Product Instructions

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

Activity Inventory -

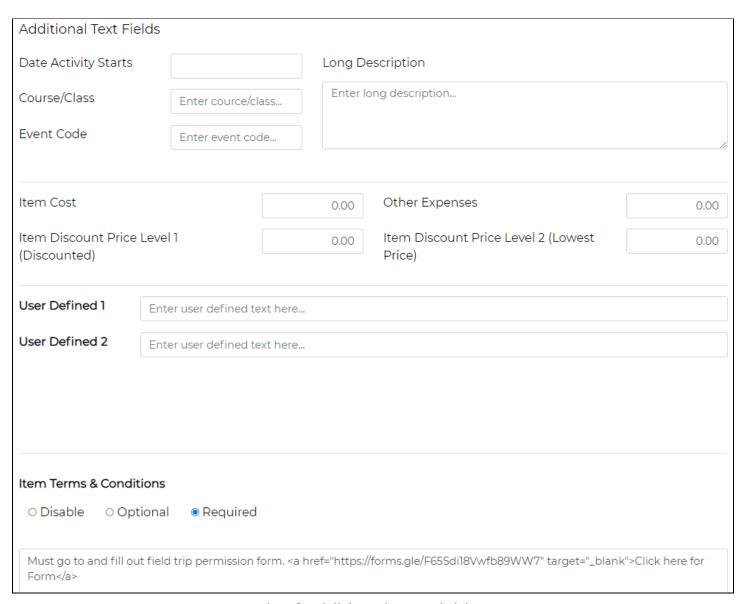
t. Limited Quantity Item - Quantity Available must be set via Inventory Quantity Adjustments after completing item setup



Example of Additional Options screen

5. OSP Products - Additional Text Fields

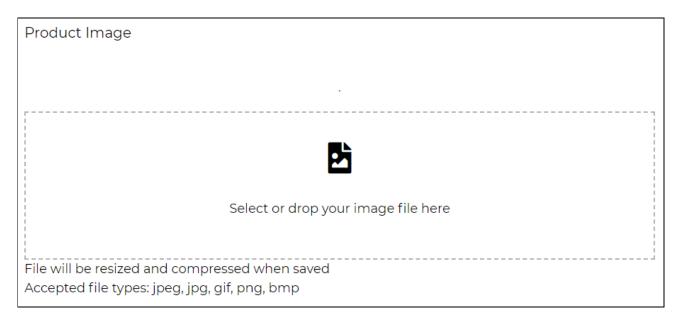
- a. Date Activity Starts
- b. Course/Class
- c. Event Code
- d. Long Description
- e. Item Cost
- f. User Defined 1 & 2
- g. Item Terms & Conditions



Example of Additional Text Fields screen

6. OSP Products - Product Image - Click Choose File

a. Use JPG, GIF, or PNG formatted images



Example of Product Image screen

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