

Azzule Premium Supply Chain Program – Quick Reference Guide

New to the Azzule Premium SCP? Here are a few quick tips to get you started.

Customers
Manage your customer list, review data permissions granted, send data, and view summary of data that has been transferred

Suppliers
Manage your supplier list, review data retrieval permissions, retrieve data, and review what has been retrieved

Audits, Lab Results, Documents
View any audits, lab results, and documents

Uploaders
Tools to upload audits, lab results, and other food safety documents for you or your suppliers

Export to Excel
Reports will have this option to allow you to work on your data using Excel.

Search options
Reports will provide you the ability to locate specific data using different search criteria

Tools
Search for information throughout the site, review login history, and manage user accounts

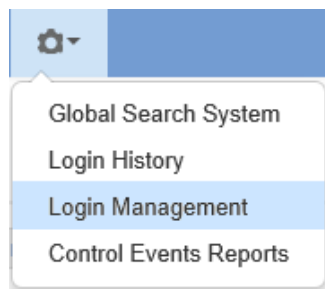
Alerts
Pending requests





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Create a User Account

1. Go to **Tools > Login Management**.

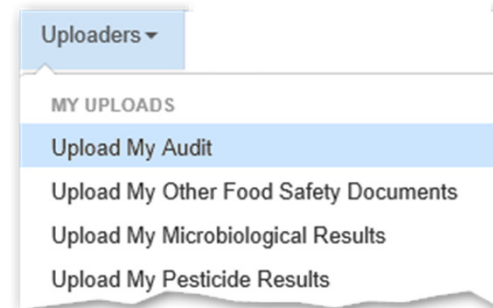


2. Click **Create a New Login**. 
3. Fill in the following required information:
Login (email address), Password, Confirm Password,
First Name, Last Name. (Expiration Date is optional.)
4. Select login type.
5. Click **Create Login**.

Note: To send the login credentials to the user, go to **Tools > Login Management**. Locate the user.
Click the  icon.

Upload an Audit

1. Go to **Uploaders > Upload My Audit**. (See note below)



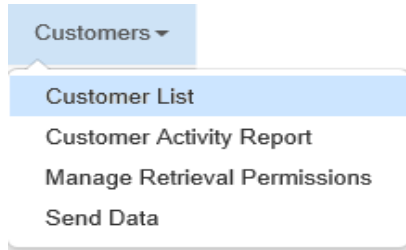
2. Click **Add New Audit**.
3. Fill in all the required audit information (those with '['*' [asterisks]).
4. Attach final audit report.
5. Attach supporting documents (ie certificate, corrective action report, etc.), if available.
6. Click **Submit**.

Note: To upload a suppliers audit, go instead to **Uploaders > Upload Supplier Audit**.

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Add a Customer

1. Go to **Customers > Customer List**.



2. Click **Add/Remove Customers**.

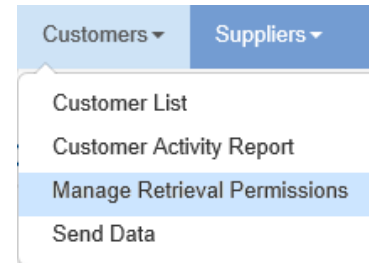
[Add/Remove Customers](#)

3. Type in part of customer name and click **Search**.
4. From the list, locate the customer you want to add.
5. Click **Add**.

Note: If the customer you want to add is not in the list, click **Request New Customer** and submit the information requested.

Approve Data Request from Customer

1. Go to **Customers > Manage Retrieval Permissions**.



2. Set **Status** to *Pending*. Pending requests will be listed.
3. To review details of the request, click on [+] icon beside the customer name.
4. Click **Approve** to approve customer's request to access your data. Click **Reject** to reject the request.

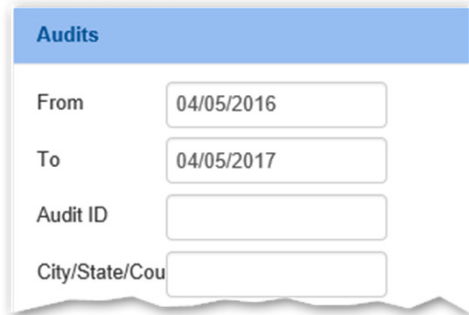


*(Note: Manage Retrieval Permissions page may also be accessed by going to **Customers > Customer List** or by clicking on the **Alerts** icon.)*

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Send an audit

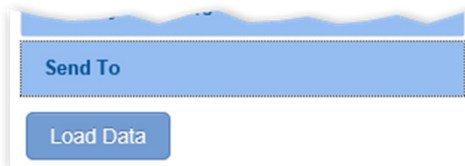
1. Go to **Customers > Send Data**.
2. Click **Send Audits**.
3. *(Optional)* Use the search options to search for specific audits.



The screenshot shows a form titled "Audits" with the following fields:

- From: 04/05/2016
- To: 04/05/2017
- Audit ID: (empty)
- City/State/Cou: (empty)

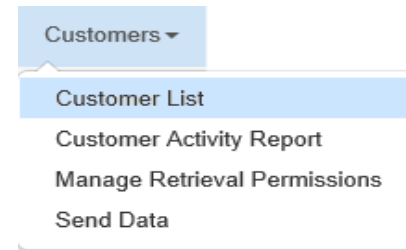
4. Click **Send To** to select the customer to send audit to.
5. Click **Load Data**.
6. Select audits to send from the list that comes up.
7. Click **Next**.
8. *(Optional)* Review what will be sent.
9. Click **Submit**.



The screenshot shows a dropdown menu titled "Send To" with a "Load Data" button below it.

Set Up Automatic Transfers to Customers

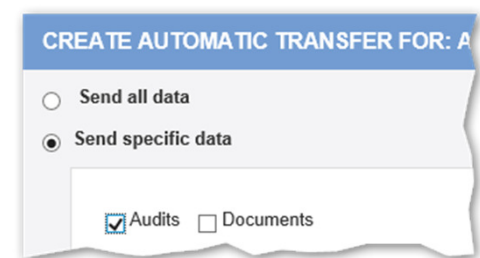
1. Go to **Customers > Customer List**.



The screenshot shows a dropdown menu titled "Customers" with the following options:

- Customer List
- Customer Activity Report
- Manage Retrieval Permissions
- Send Data

2. Locate customer from the list and click on the customer's **+** icon under **SEND DATA (AUTOMATIC TRANSFERS)** column.
3. Choose **Send specific data**.
4. Check **Audits**.
5. *(Optional)* Fill-in criteria for audit data to send.
6. Click **Create Automatic Transfer**.



The screenshot shows a dialog box titled "CREATE AUTOMATIC TRANSFER FOR: A" with the following options:

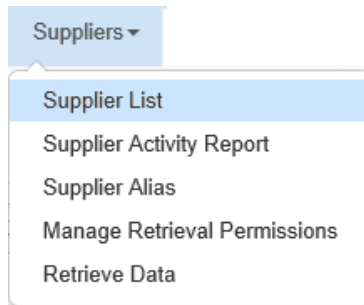
- Send all data
- Send specific data

Below the radio buttons, there are checkboxes for "Audits" (checked) and "Documents" (unchecked).

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Add a Supplier

1. Go to **Suppliers > Supplier List**.



2. Click **Add/Remove Suppliers**.

Add/Remove Suppliers

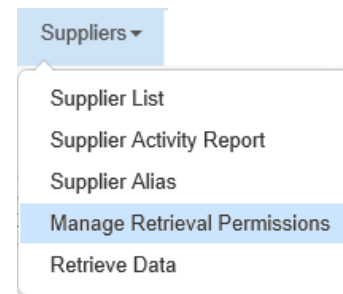
3. Type in part of the supplier's name and click Search.
4. Locate the supplier you want to add.
5. Click **Add**.
6. Note message at the bottom of the form:

The supplier relation has been created.

Note: If the supplier you want to add is not in the list, click on **Request New Supplier** and submit the information requested.

Request Supplier for Access to Data

1. Go to **Suppliers > Manage Retrieval Permissions**.



2. Locate the supplier you want to request retrieval permissions from.
3. Click the [+] icon beside the supplier name to expand the request details.
4. Click **Request**.

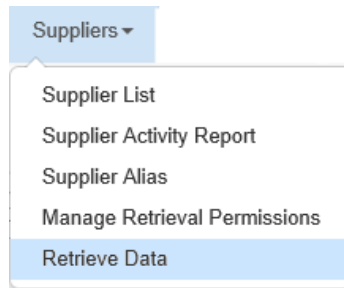
Request

Note: **Manage Retrieval Permissions** page may also be accessed by going to **Suppliers > Supplier List**.

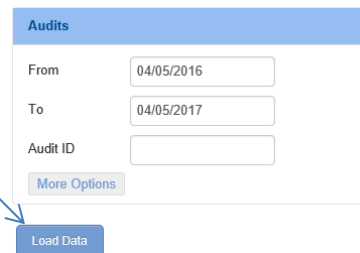
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Retrieve an Audit

1. Go to **Suppliers > Retrieve Data**.



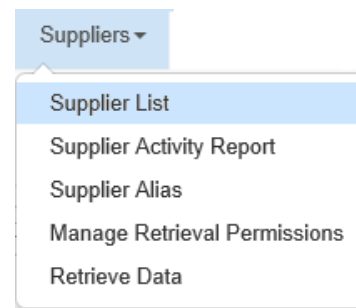
2. Click **Retrieve Audits**.
3. Select supplier's name from the list and click **Next**.
4. Enter more search criteria, if desired, and click **Load Data**.


A screenshot of the 'Audits' search form. It contains three input fields: 'From' (04/05/2016), 'To' (04/05/2017), and 'Audit ID'. Below the fields are two buttons: 'More Options' and 'Load Data'. A blue arrow points from the 'Load Data' button in this screenshot to the 'Load Data' button in the previous screenshot.

5. Select audits to retrieve and click **Next**.
6. (Optional) Review details of Audits to retrieve.
7. Click **Retrieve**.

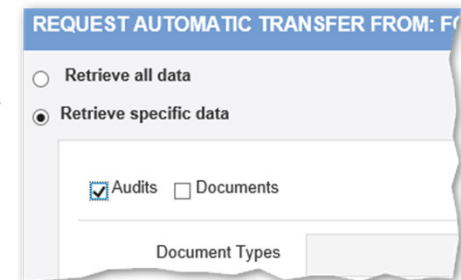
Set Up Automatic Retrieval from Supplier

1. Go to **Suppliers > Supplier List**.



2. Locate supplier from the list and click on the supplier's  icon under the **RETRIEVE DATA (AUTOMATIC TRANSFERS)** column.

3. Choose **Retrieve specific data**.

A screenshot of a dialog box titled 'REQUEST AUTOMATIC TRANSFER FROM:'. It has two radio buttons: 'Retrieve all data' (unselected) and 'Retrieve specific data' (selected). Below the radio buttons are two checkboxes: 'Audits' (checked) and 'Documents' (unchecked). At the bottom, there is a 'Document Types' field and a 'Send Request' button.

4. Check **Audits**.
5. (Optional) Fill-in criteria for audit data to send.
6. Click **Send Request**.

