Food4All Setup Guide

Food4All

Introduction to Food4All

Food4All allows farmers to create a virtual shopping cart for customers. Food4All can directly process online payments. Products are highly customizable and farmers can generate a variety of order reports.

Key links for Food4All

- Food4All Website
- Example Airtable "Store"
- Food4All Support Resources

Pricing	Free to use, but credit card orders incur a 3.4% + $0.30 fee per transaction
Setup time	30-40 min
Pros	- Free tool that handles online payments - More robust customer experience - Capable of handling a more logistically intense operation
Cons	- Limited branding/customization - More time-consuming setup
Features	- Handles online payment processing through Stripe - Highly customizable product specifications: set order cutoffs, customizations, pickup locations/schedules, and more - Automatic email confirmation provides you with order details and buyers with a digital receipt - Fulfillment report, sales report, and monthly receipt report

	• Supports CSA/subscription sales, not just one-time sales
Payments	• Credit card payments are deposited weekly into your bank account • Supports credit card, check, and SNAP/EBT onsite payment • Credit card payments incur a 3.4% + $0.30 per transaction processing fee

Use Food4All if:

- You would like to provide your customers with a virtual shopping cart experience
- Your operation is logistically intense
- You don't have time to manually track customer payments

Step 1: Create account

- Go to Food4Alls signup page
- Create an account and log in

Step 2: Add bank information

- Click `Seller` → `My Account` → `Setup Bank`
- **Enter bank information into your account. You will need:**
  - The name of your business as it appears on your bank account (if the account you're using is attached to your SSN, use your name in place of the name of your business)
  - Bank account number
  - Routing number
- **Complete Stripe verification process**
  - You will need EIN or SSN
  - Stripe will ask more questions to verify your business and bank information
  - Process may take a few hours to a few days to complete

Step 3: Configure account settings

- From the dashboard: click `My Account` → `Account Settings`
- **Add details about your farm**
  - Add payment options (check or SNAP/EBT onsite)
  - Add "About Us" description

- Add "Certifications/Practices"
- Upload banner and logo (pay attention to image size guidelines)
- **Activate your online site**
  - Click `Enable link to your shopping page`
    - Be sure to save the link to your shopping page
  - Click the magnifying glass icon next to `Preview Shopping Page` to preview your site
  - Scroll up and click `Save` at the top right

Step 4: Pickup locations & schedule

- From the dashboard: click `My Locations` → `Add Location`
- **Add pickup location details**
  - Add location name and address
  - Specify if location is the primary location
  - Add contact information for that location
- **Set pickup schedule**
  - Specify the services offered at this location as "Pickup"
  - Add location schedule
  - Specify cut-off date or lead time
- **Adding delivery locations/zones**
  - You can offer delivery through your own business or through a third party.
  - To do so, you must email support@food4all.com and follow the next steps they provide.

Step 5: Goods & recurrence patterns

- From dashboard: click `My Goods` → `Add/Edit Goods` → `Add Good`
- **Select good type**
  - "CSA/Farm Share" → subscription product
  - "Simple Good" → one-time order product without options
  - "Good with Options" → one-time order with options
- **Adding simple goods**
  - **Add general information**
    - Add a name, description, and photo
    - Check the `Active` and `Online Shopping Page` checkboxes
    - Select the locations where your items will be available for pickup and click `Next`
  - **Add your product ordering details**

- Mandatory fields: "Unit of measurement (UOM)", "Minimum orderable units (MOU)", "Force increments of", and "Retail Price per UOM"
- Optional fields:
    - Product availability dates
    - Limits to the number of units (UOM) available within a given time period
        - 7 day UOM limit will prevent customers from ordering the product if the system already received the maximum allowed number of orders in the 7 days prior to the next pickup day
- **Adding CSA/Farm Share**
    - **Add the recurrence pattern that will be tied to your CSA product**
        - Go back to `My Goods` → `Recurrence pattern`
        - Add start/end date and recurrence pattern type
        - Specify the pickup location(s) and schedule for each location
    - **Add the CSA product as a good**
        - Add general information
            - Go back to `My Goods` → `Add/Edit Goods` → `Add Good` → `CSA/Farm Share`
            - Add a name, description, and photo
            - Check the `Active` and `Online Shopping Page` checkboxes
            - Select the recurrence pattern to be associated with your CSA and click `Next`
        - **Set the good options**
            - Add your option label - this describes how your good varies (e.g. size)
            - Add your variant labels - this describe possible instances of your option (e.g. if your option is size, then your variants can be 5 lb and 10 lb), click `Next`
        - **Review options and add prices**
            - Set the "Retail Price" of each option variant
            - Choose which variant will be the default selection
- **Adding goods with options**
    - **Add general information**
        - Add a name, description, and photo
        - Check the `Active` and `Online Shopping Page` checkboxes
        - Select the locations where your items will be available for pickup and click `Next`
    - **Set the good options**
        - Add your option label - this describes how your good varies (e.g. size)

- Add your variant labels - this describe possible instances of your option (e.g. if your option is size, then your variants can be 6 oz and 12 oz), click `Next`
    - **Review options and add prices**
        - Set the "Retail Price" of each option variant
        - Choose which variant will be the default selection, click `Next`
    - **Set optional good attributes such as dietary attributes, primary ingredients, sides included, and additional info, click `Next`**
    - **Set choices, allowed additions, holds, and substitutions**
        - The "Add Choice" field indicates your choice label - this describes how your good varies (e.g. flavor)
        - The "Value" field indicates your variant labels - this describes possible instances of your choice (e.g. strawberry, blueberry, etc)

Step 6: Share your site

- From dashboard: click `My Account` → `Account Settings`
- Scroll to the bottom to find the link to your online store
- Share this link on your website, social media, and email newsletters

Step 7: Track your orders

- When a customer places an order, they will receive an email receipt and you will receive an email notification with the order details
- **View all orders**
    - From dashboard: click `My Orders` → `Order List`
    - Click on an order entry to see details of the order
    - **Making a refund**
        - If a customer paid by credit card, you can click `Refund` to refund all or part of their order.
            - Stripe handles the refund
            - The refund will appear on the customers' credit card statement in 3-5 days
- **View fulfillment report**
    - From dashboard: click `My Orders` → `Fulfillment Report`
    - Specify fulfillment date, click `Generate`
    - View all order details for the specified fulfillment date as a spreadsheet
    - Click `Download` to download fulfillment report as an Excel spreadsheet
- **View sales report**

- From dashboard: click `My Orders` → `Sales Report`
- Specify start and end date of the report, click `Generate`
- Optional: specify item name and order source
- View all orders for the specified time period as a spreadsheet
- Click `Download` to download sales report as an Excel spreadsheet