CONTINUUM

QA Addendum

Quality Control

The quality assurance features, for sites with QA.
Covers: The QA Menu · Lots and Inspections · Packing House · Problems and Actions · Growers and Inspectors · Traceability · Management · CanadaGAP · Mexico

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A. About the QA Addendum

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A.1 What QA Adds

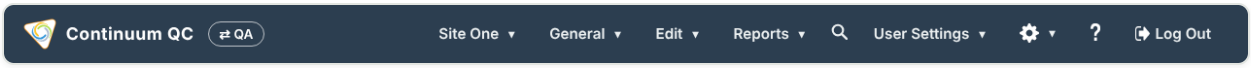
This addendum describes the quality assurance (QA) features of Continuum Quality Control. Each site has one of two editions: QC, with everything in the Continuum Quality Control User Manual, or QA, which is QC with the features described here. At a site with QA, everything in the user manual stays the same: the QC menus, pages and reports don't change, and the QA features have menus of their own (A.2).

The addendum follows the numbering of the user manual. The QA features are sections 6.7 to 6.84, after 6.6 Editing a Past Inspection; then come the troubleshooting rows for the QA features (7.3), their glossary terms (8.1) and the revision history of the QA chapters (8.2). A reference to a section that isn't in this addendum, such as 3.2 or 6.6, is to the user manual.

> **Note:** Whether a site has QA, and until when, is part of your company's Continuum subscription: ask Continuum support to change it (see 7.5 in the user manual). When a site's QA ends, its QA menus and pages are no longer shown and its QA emails stop; the QA records are kept, and they are back when QA is turned on again.

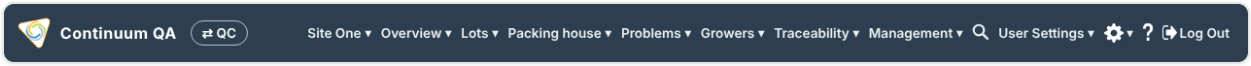
A.2 The QA Menus

At a site with QA, the menu bar shows one set of menus at a time: the QC menus, for the inspections, as in the user manual, or the QA menus, for the QA features. After you sign in, the bar shows Continuum QC and the QC menus, with the switch ⇄ QA right of the name.



After signing in: Continuum QC, the switch ⇄ QA and the QC menus

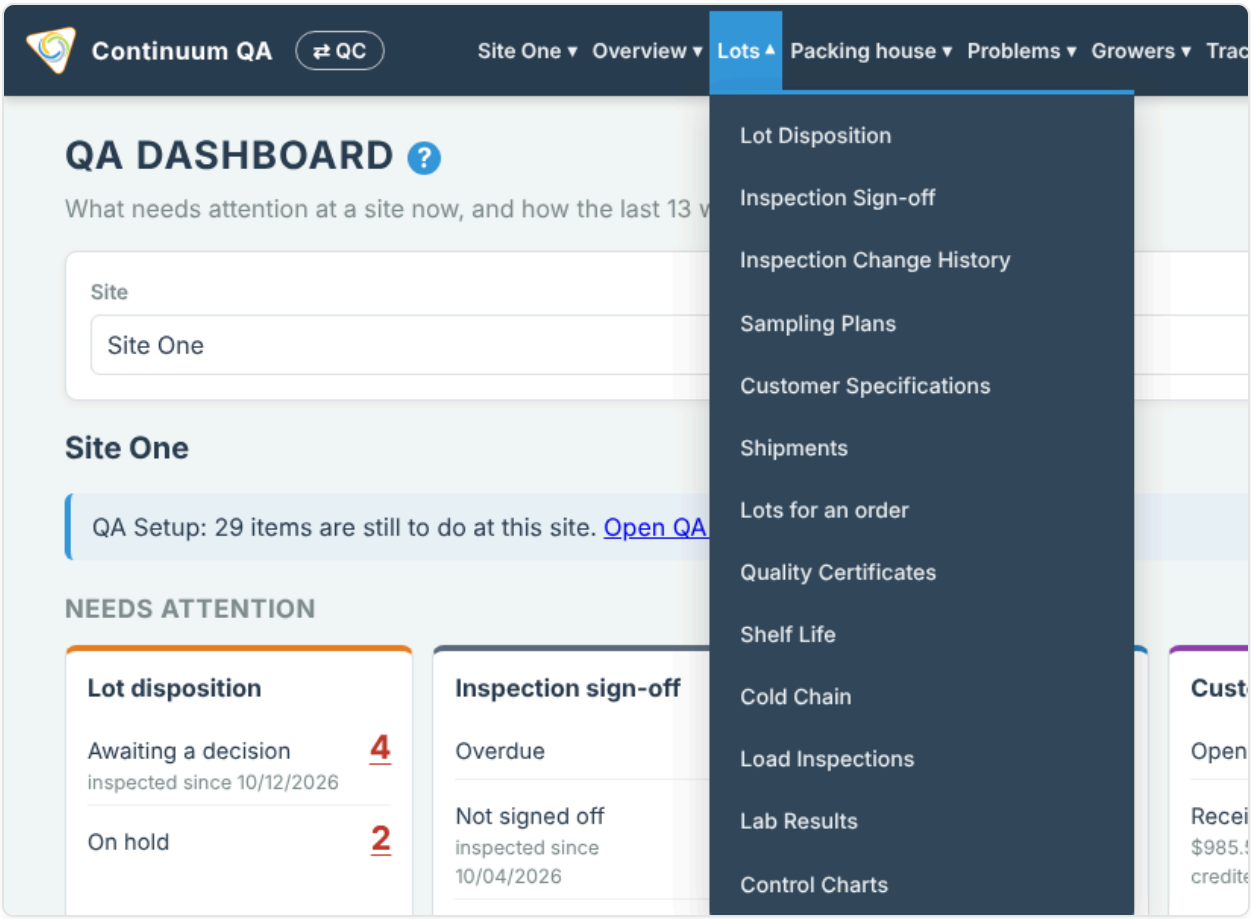
Select ⇄ QA: the name becomes Continuum QA and the bar shows the QA menus, Overview, Lots, Packing house, Problems, Growers, Traceability and Management (and CanadaGAP or Mexico, at a site that follows it: see 6.74 and 6.81), with the switch ⇄ QC to go back. The page you are on stays open; only the menus change. User Settings, the gear, the Help icon (?) and Log Out are there with either set.



The QA menus, with the switch ⇄ QC

The bar keeps the set you chose on every page until you sign out; the next time you sign in, it starts with the QC menus. The Help icon (?) opens this addendum while the bar shows the QA menus, and the user manual while it shows the QC menus. On a phone, the switch stays beside the name and the menus open from the menu button, as before.

Each QA menu lists the QA pages you can open. Overview ends with QA Setup, after a line; Management has two parts, People and security, then Management:



The Lots menu

Menu	Page	Who sees it
Overview	Today	Everyone at a site with QA: Users, Quality Control Managers and Administrators; no permission is needed (see 6.60).
	QA Dashboard	Quality Control Managers, and Users with the QA Dashboard permission (see 6.14).
	Company Overview	Administrators, and Quality Control Managers for their sites (see 6.59).
	Cross-site Reports	System administrators, and Quality Control Managers for their sites (see 6.66).
	Site Setup	Administrators, and Quality Control Managers for their sites (see 6.58).

Menu	Page	Who sees it
	Trend Alerts	Quality Control Managers, and Users with the Trend Alerts permission (see 6.13).
	Audit Pack	Quality Control Managers, and Users with the Audit Pack permission (see 6.17).
	QA Setup	Quality Control Managers and Administrators (see 6.32).
	CanadaGAP Module	Administrators and Quality Control Managers, once the module is installed; it is never hidden (see 6.74).
	Mexico Module	Administrators and Quality Control Managers, once the module is installed; it is never hidden (see 6.81).
Lots	Lot Disposition	When it is turned on for the site (see 6.7). Users need the Lot Disposition permission.
	Inspection Sign-off	Quality Control Managers, and Users with the Inspection Sign-off permission (see 6.16).
	Inspection Change History	Quality Control Managers and Administrators (see 6.8).
	Sampling Plans	Quality Control Managers, and Users with the Sampling Plans permission (see 6.33).
	Customer Specifications	Quality Control Managers, and Users with the Customer Specifications permission (see 6.24).
	Shipments	Quality Control Managers, and Users with the Customer Specifications permission, who see the shipments without recording them (see 6.70).

Menu	Page	Who sees it
	Lots for an order	Quality Control Managers, and Users with the Customer Specifications permission; only Quality Control Managers start a shipment from it (see 6.70).
	Quality Certificates	Quality Control Managers, and Users with the Quality Certificates permission (see 6.25).
	Shelf Life	Quality Control Managers, and Users with the Shelf Life permission (see 6.23).
	Cold Chain	Quality Control Managers, and Users with the Cold Chain permission (see 6.34).
	Load Inspections	Quality Control Managers, and Users with the Load Inspections permission: those chosen to inspect the outbound loads, and those who see the inspections (see 6.44).
	Lab Results	Quality Control Managers, and Users with the Lab Results permission, who record tests and type in their results (see 6.38).
	Control Charts	Quality Control Managers, and Users with the Control Charts permission, who see the charts but change nothing (see 6.37).
Packing house	Environmental Monitoring	Quality Control Managers, and Users with the Environmental Monitoring permission, who take the swabs and record their results (see 6.40).
	Sanitation	Quality Control Managers, and Users with the Sanitation permission: the sanitation crew, who record the cleaning done, and those chosen to do the pre-op checks and verify the cleaning (see 6.41).

Menu	Page	Who sees it
	Label Checks	Quality Control Managers, and Users with the Label Checks permission: those chosen to check the labels on the packing lines, and those who see the checks (see 6.42).
	Wash Water	Quality Control Managers, and Users with the Wash Water permission: those chosen to check the wash water and record the water changes, and those who see the checks (see 6.43).
	Metal Detection	Quality Control Managers, and Users with the Metal Detection permission: those chosen to check the metal detectors and record the foreign material found, and those who see the checks (see 6.46).
	Net Weight Checks	Quality Control Managers, and Users with the Net Weight Checks permission: those who weigh the packs and record the checks, and see them (see 6.47).
	Glass and Brittle Plastics	Quality Control Managers, and Users with the Glass and Brittle Plastics permission: those who check the areas and record breakages and their cleanup, and see them (see 6.48).
	Water Testing	Quality Control Managers, and Users with the Water Testing permission: those who record the water samples and their results, and see them (see 6.49).
	Maintenance	Quality Control Managers, and Users with the Maintenance permission: those who request work, record the work done and the planned maintenance done, and see them (see 6.50).
	Calibration Records	Quality Control Managers, and Users with the Calibration Records permission (see 6.12).

Menu	Page	Who sees it
	From the FS App	Quality Control Managers, and Users with the From the FS App permission: the Food Safety app's runs that couldn't become records, and every run of the last 7 days (see 6.71).
	Locations, Areas and Equipment	Quality Control Managers, who keep each site's Locations, Areas and Equipment for the Food Safety app and Maintenance, and Users with the Locations, Areas and Equipment permission, who see them (see 6.72).
Problems	Non-Conforming Product	Quality Control Managers, and Users with the Non-Conforming Product permission (see 6.35).
	Corrective Actions	Quality Control Managers, and Users with the Corrective Actions permission (see 6.9).
	Customer Claims	Quality Control Managers, and Users with the Customer Claims permission (see 6.10).
	Recalls	Quality Control Managers, and Users with the Recalls permission, the recall team, who tell the customers and record their answers and the checks (see 6.39).
	Mock Recalls	Quality Control Managers, and Users with the Mock Recalls permission (see 6.28).
	Change Control	Quality Control Managers, and Users with the Change Control permission (see 6.31).
	Risk Register	Quality Control Managers, and Users with the Risk Register permission, who see it but change nothing (see 6.36).
Growers	Approved Growers	Quality Control Managers, and Users with the Approved Growers permission (see 6.21).

Menu	Page	Who sees it
	Approved Suppliers	Quality Control Managers, and Users with the Approved Suppliers permission, who add the suppliers and their documents (see 6.45).
	Field Audits	Quality Control Managers, and Users with the Field Audits permission: those who keep the growers' fields and assess them before harvest (when chosen in the page's Settings), and those who see the fields and their assessments (see 6.53).
	Grower Certificates	Quality Control Managers, and Users with the Grower Certificates permission (see 6.15).
	Grower Action Requests	Quality Control Managers, and Users with the Grower Action Requests permission (see 6.19).
	Grower Scorecards	Quality Control Managers, and Users with the Grower Scorecards permission (see 6.11).
	Inspector Training	Quality Control Managers, and Users with the Inspector Training permission (see 6.18).
	Inspector Calibration	Quality Control Managers, and Users with the Inspector Calibration permission (see 6.26).
Traceability	Traceability Events	Quality Control Managers, and Users with the Traceability permission: those who record the lots' events (harvesting, cooling, initial packing, shipping, receiving, transformation), import them, trace lots and download the FDA spreadsheet (see 6.61).
	Agency Connections	Administrators and Quality Control Managers: the traceability files sent to the systems the buyers use, their approval, and the USDA Market News prices (see 6.63).

Menu	Page	Who sees it
	Buyer Compliance	System administrators and Quality Control Managers: the buyers' yearly questionnaires and audit information in their systems, and the certificates of the facilities from USDA Organic INTEGRITY and Azzule (see 6.64).
	Market Prices	System administrators and Quality Control Managers: the USDA Market News prices as a report, with the company's shipments and claims beside the market (see 6.65).
Management	Employee Training	Quality Control Managers, and Users with the Employee Training permission (supervisors, human resources): those who record the training sessions given to the site's workers, keep the workers, and see who is due for training (see 6.52).
	Visitors and Contractors	Quality Control Managers, and Users with the Visitors and Contractors permission (reception, security): those who sign visitors and contractors in and out, and see the visitor log (see 6.51).
	Food Defense	Quality Control Managers, and Users with the Food Defense permission: those who do the security checks (when chosen in the page's Settings), and everyone who sees the checks, reports incidents and sees the vulnerability assessment (see 6.54).
	Controlled Documents	Quality Control Managers, and Users with the Controlled Documents permission (see 6.22).
	Internal Audits	Quality Control Managers, and Users with the Internal Audits permission (see 6.29).

Menu	Page	Who sees it
	External Audits	Quality Control Managers, and Users with the External Audits permission (see 6.30).
	Quality Objectives	Quality Control Managers, and Users with the Quality Objectives permission (see 6.27).
	Management Review	Quality Control Managers, and Users with the Management Review permission (see 6.20).
CanadaGAP	CanadaGAP Programme	At a site that follows CanadaGAP: Quality Control Managers, and Users with the CanadaGAP Programme permission (see 6.75).
	CanadaGAP Forms	Quality Control Managers, and Users with the CanadaGAP Forms permission (see 6.76).
	Agronomic Inputs (H1, H2)	Quality Control Managers, and Users with the Agronomic Inputs permission (see 6.77); growers have Agronomic Inputs on the grower menu.
	Input Product Library	Quality Control Managers, and Users with the Input Product Library permission (see 6.78).
	Assessments (A, B, C, D, F, S, T, U, V)	Quality Control Managers, and Users with the CanadaGAP Assessments permission (see 6.79).
	Pest Program (E, M)	Quality Control Managers, and Users with the CanadaGAP Pest Program permission (see 6.80).
Mexico	SENASICA Programme (SRRC)	At a site that follows Mexico: Quality Control Managers, and Users with the SENASICA Programme permission (see 6.82).

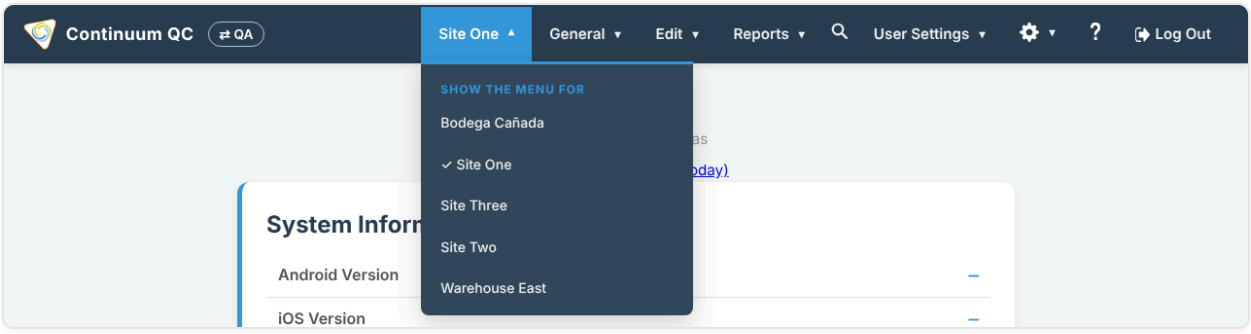
Menu	Page	Who sees it
	Pesticide and Fertilizer Applications	Quality Control Managers, and Users with the Agronomic Inputs permission: the Agronomic Inputs page, in Mexico's words (see 6.77).
	Input Products and Receipts	Quality Control Managers, and Users with the Input Product Library permission (see 6.78).
	Harvest Crews	Quality Control Managers, and Users with the Harvest Crews permission (see 6.83).
	Hot-Water Treatment	Quality Control Managers, and Users with the Hot-Water Treatment permission (see 6.84).
	Pest and Wildlife Control	Quality Control Managers, and Users with the Pest Program permission: the Pest Program page, in Mexico's words (see 6.80).

Quality Control Managers see every page of the QA menus at their sites with QA. Users see Today and the pages they have the permission for: the QA pages' permissions are on Add / Change User Permissions (3.3) for the Users of a site with QA, and Permission Sets gives them to many Users at once (see 6.57). A menu with none of your pages isn't shown.

The switch ⇄ QA is there only at a site with QA, for someone with at least one QA page there; without it, the bar shows the QC menus as before.

With two sites or more, one of them with QA at least, such as a Quality Control Manager of several sites or a system administrator, the first item of the menu bar, left of the first menu, is the site the menus are for. Select it and choose another site under Show the menu for: the page opens again for that site. With the QC menus the list offers all your active sites; with the QA menus, only those with QA; with more than 10 sites, Type to find... finds one. At a site without QA the bar shows the QC menus, and ⇄ QA moves the menus to your first site with QA. When you sign in, the menus are for your first site with QA; the site you choose stays while you are signed in, and opening a QA page for another site with QA moves

the menus to that site (see 6.68). The search icon, right of the menus, searches all your sites (see 6.67).



The site list on the menu bar, with the QC menus

Farmer Users of a site with QA have a QA menu, beside their other menus and with no switch, with Today, what is waiting for them (see 6.60); Action Requests, the action requests sent to their growers (see 6.19); and, once a site of the company takes growers' harvest records, Harvest Records, where they record the harvests they deliver (see 6.62).

The traceability module also adds pages to the Settings menu (the gear) for Administrators: under Sites, Import Sites, Growers and Users (see 6.55) and Site Groups (see 6.56); under Users, Permission Sets (see 6.57), which Quality Control Managers have too.

A.3 QA on the QC Pages

At a site with QA, some pages of the user manual show more:

- Change Site Settings (3.2): Quality Assurance — Lot Disposition (Yes/No) turns on lot disposition for the site (see 6.7).
- Add / Change User Permissions (3.3): the permissions for the QA pages, for the Users of a site with QA (see A.2).
- Assign Grower User to Grower (3.3): a grower user also answers the action requests of the growers linked to their account (see 6.19).
- Edit Quality Inspections (6.6): under each inspection, the links and warnings of the QA features, as follows.

Note: When the inspection has been signed off (see 6.16), the line under it says who signed it off and when. Editing it afterwards shows it as Changed since sign-off until it is signed off again.

Note: When the site checks inspector training (see 6.18) and the inspector wasn't qualified for the commodity on the inspection date, a warning under the inspection says so, with a See training link to the inspector's training.

Note: Request grower action, under the inspection, asks the lot's grower to find the cause of a problem and say what they are doing about it (see 6.19).

Note: A warning under the inspection says when its grower was suspended or not approved on the inspection date, or has been since, with See approval to open the grower's approval (see 6.21).

Note: Keep a shelf-life sample, under the inspection, keeps a sample of the lot to check on set days; Shelf-life samples lists the samples already kept from it, with how many failed (see 6.23).

Note: Customer specs: meets 2 of 3, under the inspection, says how many of the customers with a spec for the commodity the lot meets; select it to see why and to record where the lot goes. A warning says when the lot is going to a customer whose spec it doesn't meet (see 6.24).

Note: For each customer the lot is recorded as going to, the links under the inspection open its quality certificate, such as Quality certificate QC-2026-0003 (FreshMart Distribution), or say Issue a quality certificate (FreshMart Distribution) when it has none yet (see 6.25).

Note: The links also show the lot's mock recalls, such as Mock recall RC-3 (in progress), and, for Quality Control Managers, Start a mock recall on the lot (see 6.28).

Note: When the commodity has a sampling plan, the links also say how the inspection stands against it, such as Sampling plan: 50 units for a lot of 500, accept 3: 100 inspected, 5 defects — rejected. One not accepted (rejected, too few units inspected, or no lot size) comes first, as a warning; See the plan opens it on Sampling Plans (see 6.33).

Note: When the commodity has temperature limits, the links also give the lot's temperatures against them, such as Temperature: 38 °F, above the limits (34 to 37 °F). One out of range comes first, as a warning; See the limits opens the lot on Cold Chain (see 6.34).

Note: The links also list the lot's non-conforming product records: one not closed comes first, as a warning, such as Non-conforming product NC-12: waiting for a decision (120 cases). Log non-conforming product starts a record on the lot (see 6.35).

Note: With Lab Results, the links also list the lot's lab tests: a failed one not yet dealt with comes first, as a warning, such as Lab test failed: LT-2 (European Union). Record a lab test records a sample of the lot sent to a lab (see 6.38).

Note: With Recalls, a lot in an open recall shows it first, as a warning, such as In an open recall, RC-1: Tomato lots L-66000 and L-69600…; a lot of a closed recall links it. Quality Control Managers have Start a recall, which starts one from the lot (see 6.39).

Note: With Environmental Monitoring, a lot packed while a food-contact swab point was positive shows it first, as a warning, such as Packed while food-contact swab point Z1-04 tested positive for Listeria spp. (EM-3): what was done with the product isn't recorded yet, until that is recorded on the positive (see 6.40).

Note: With Label Checks, the links also show the lot's label checks, such as Label checks (3, 1 wrong). While a wrong label on the lot isn't corrected, A wrong label not corrected yet on this lot comes first, as a warning (see 6.42).

Note: With Wash Water, the links also show the lot's wash water checks, such as Wash water (14, 1 out of range). While a reading out of range with the lot isn't corrected, Wash water out of range, not corrected yet, with this lot comes first, as a warning (see 6.43).

Note: With Load Inspections, the links also list the loads the lot went on, the newest first, such as Loads (12): LD-00023 FreshMart Distribution, LD-00022 FreshMart Distribution...; select it to see them on Load Inspections (see 6.44).

Note: With Metal Detection, the links also show the lot's metal detector checks and the foreign material found in it, such as Metal detector (3, 1 failed; foreign material found: 1); a lot with no checks, only foreign material found in it, shows Foreign material found (1), which opens it. While a failed check with the lot isn't fixed, A metal detector check failed with this lot, not fixed yet comes first, as a warning (see 6.46).

Note: With Net Weight Checks, the links also show the lot's net weight checks, such as Net weight checks (12, 1 failed). While a failed check with the lot isn't dealt with, Net weight check failed, not dealt with yet, with this lot comes first, as a warning (see 6.47).

Note: With Glass and Brittle Plastics, the links also show the breakages the lot was exposed to, such as Glass or plastic breakages (1). While one of them isn't cleared, Glass or brittle plastic breakage not cleared, with this lot exposed comes first, as a warning (see 6.48).

Note: With Field Audits, the links also show the grower's fields with how many were approved for harvest on the inspection date, such as Field audits (3 fields, 1 approved that day). When the grower had fields in their harvest season that day and none of them was approved, The grower's fields in season that day weren't approved for harvest comes first, as a warning (see 6.53).

Note: With Food Defense, the links also show the food defense incidents that may have affected the lot, such as Food defense incidents (1). While one of them is open, A food defense incident, still open, may have affected this lot comes first, as a warning (see 6.54).

6. Quality Assurance Features

The QA features, each with its page in the QA menus (A.2). These sections follow 6.6, Editing a Past Inspection, in the user manual.

6.7 Lot Disposition

Lot disposition records what happens to each inspected lot — accepted, held, rejected, and so on — so the decision, the reason, and who made it are kept with the inspection. Each decision is emailed to the people who receive that commodity's inspection emails.

1. Go to Lots > Lot Disposition.
2. Quality Control Managers choose the Site. Users see their own site.
3. Optional: set Inspected from / Inspected to, choose a Disposition (for example Pending), or search by serial or lot number, and select Apply Filter. A search covers every date.
4. Select Decide (or Change) next to the lot.
5. Choose the disposition and enter a note, then select Save. A message says whether the decision was emailed.

Disposition	Use it when
Accepted	The lot can be used or shipped as it is.
Accepted with conditions	The lot can be used once something is done first, such as sorting or repacking. Say what in the note.
On hold	The lot must not move until it is checked again or a decision is made. Say why in the note.

Disposition	Use it when
Rejected	The lot is refused, for example returned to the grower. Say why in the note.
Dumped	The lot is destroyed. Say why in the note.

LOT DISPOSITION

Record what happens to each inspected lot. Every decision is kept with who made it and when, and is emailed to the commodity's contacts at the site.

Site: Acme Produce | Inspected from: 10/01/2026 | Inspected to: 10/13/2026 | Disposition: All

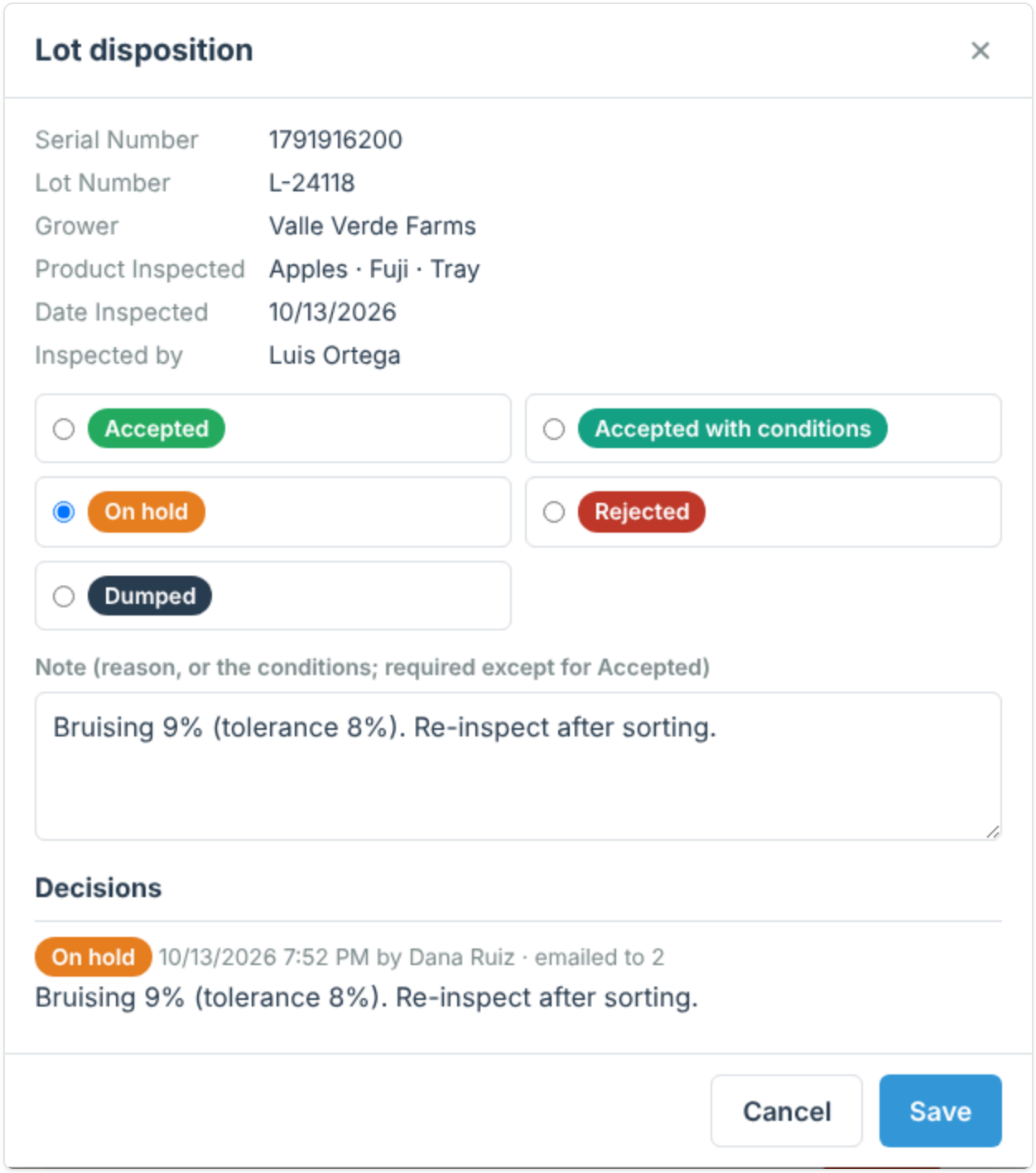
Serial or lot number

Apply Filter

Pending: 1 | Accepted: 1 | Accepted with conditions: 1 | On hold: 1 | Rejected: 1 | Dumped: 1

Date Inspected	Serial / Lot Number	Grower	Product Inspected	Disposition
10/13/2026 Luis Ortega	1791916200 Lot L-24118	Valle Verde Farms	Apples · Fuji · Tray	On hold Dana Ruiz 10/13/2026 7:52 PM Change
10/13/2026 Maria Lopez	1791907200 Lot L-24117	Sunrise Orchards	Apples · Gala · Bin	Pending Decide
10/12/2026 Maria Lopez	1791838800 Lot L-24109	Sunrise Orchards	Apples · Gala · Bin	Accepted Dana Ruiz 10/13/2026 7:52 PM Change
10/12/2026 Luis Ortega	1791818100 Lot L-24105	Desert Bloom Growers	Apples · Fuji · Tray	Rejected Dana Ruiz 10/13/2026 7:52 PM Change
10/11/2026 Maria Lopez	1791738000 Lot L-24098	Valle Verde Farms	Apples · Gala · Bin	Accepted with conditions Dana Ruiz 10/13/2026 7:52 PM Change
10/10/2026 Luis Ortega	1791673200 Lot L-24090	Sunrise Orchards	Apples · Fuji · Tray	Dumped Dana Ruiz 10/13/2026 7:52 PM Change

Lot Disposition — each lot with its disposition



Lot Disposition — deciding a lot, with the earlier decisions

Note: A note is required for every disposition except Accepted. Changing a decision never overwrites it: every decision stays listed in the window, with who made it, when, and whether it was emailed — for example, a lot On hold can later be Accepted.

Note: Lots are listed as Pending from the day lot disposition was turned on for the site; older lots are listed once they have a decision, or when you search for them. Edit Quality Inspections shows an inspection's disposition with a Change link.

Note: The email goes to the contacts assigned to the commodity at the site (gear > Contacts > Assign Notifications to Contacts), in each contact's language, from the site's email account. No email is sent when Auto Notifications is off for the site or no contact is assigned; the message after Save says so.

Tip: Lot disposition is off until it is turned on for each site: gear > Sites > Change Site Settings > Quality Assurance > Lot Disposition = Yes (see 3.2). Give Users the Lot Disposition permission on gear > Users > Add / Change User Permissions; they see it after they next sign in.

Note: When the site requires grower certificates, a lot whose grower had no required certificate on file, or one that was not current on the inspection date, shows a warning under the grower and in the window where you decide (see 6.15). The warning is for information: the lot is decided as usual.

Note: When the site checks inspector training, a lot inspected by someone not qualified for the commodity on the inspection date shows a warning under the inspector, and in the window where you decide (see 6.18). It is for information too.

Tip: In the window where you decide, Request action from the grower asks the lot's grower for the cause and what they are doing about it, and lists the requests already sent (see 6.19).

Tip: A lot from a grower who was suspended or not approved on the inspection date, or has been since, shows a warning under the grower and in the window where you decide (see 6.21). Nothing is blocked: decide what to do with the lot as usual.

Tip: In the window where you decide, Shelf-life samples lists the samples kept from the lot with how each stands, and Keep a shelf-life sample keeps another (see 6.23).

Tip: A lot going to a customer whose spec it doesn't meet shows a warning under the product and in the window where you decide. In the window, Customer specifications lists the customers whose spec the lot meets or doesn't, and who it is going to; See why, and record where it goes opens the lot on Customer Specifications (see 6.24).

Tip: A lot its sampling plan doesn't accept shows a warning under its lot number, such as Sampling plan: rejected, and the full result in the window where you decide (see 6.33).

Tip: A lot with a temperature out of its commodity's limits shows Temperature out of range under its lot number, and its temperatures against the limits in the window where you decide (see 6.34).

Tip: A lot with a non-conforming product record not closed shows Non-conforming product: NC-12 under its lot number, and the record in the window where you decide (see 6.35). Its disposition isn't changed by the record.

> **Tip:** A lot with a failed lab test not yet dealt with shows Lab test failed: LT-2 under its lot number, and the test in the window where you decide (see 6.38). Its disposition isn't changed by the test.

> **Tip:** A lot in an open recall shows In recall: RC-1 under its lot number, and the recall in the window where you decide, where Quality Control Managers also have Start a recall of this lot (see 6.39). Its disposition isn't changed by the recall: put the lot on hold too if it is still at the site.

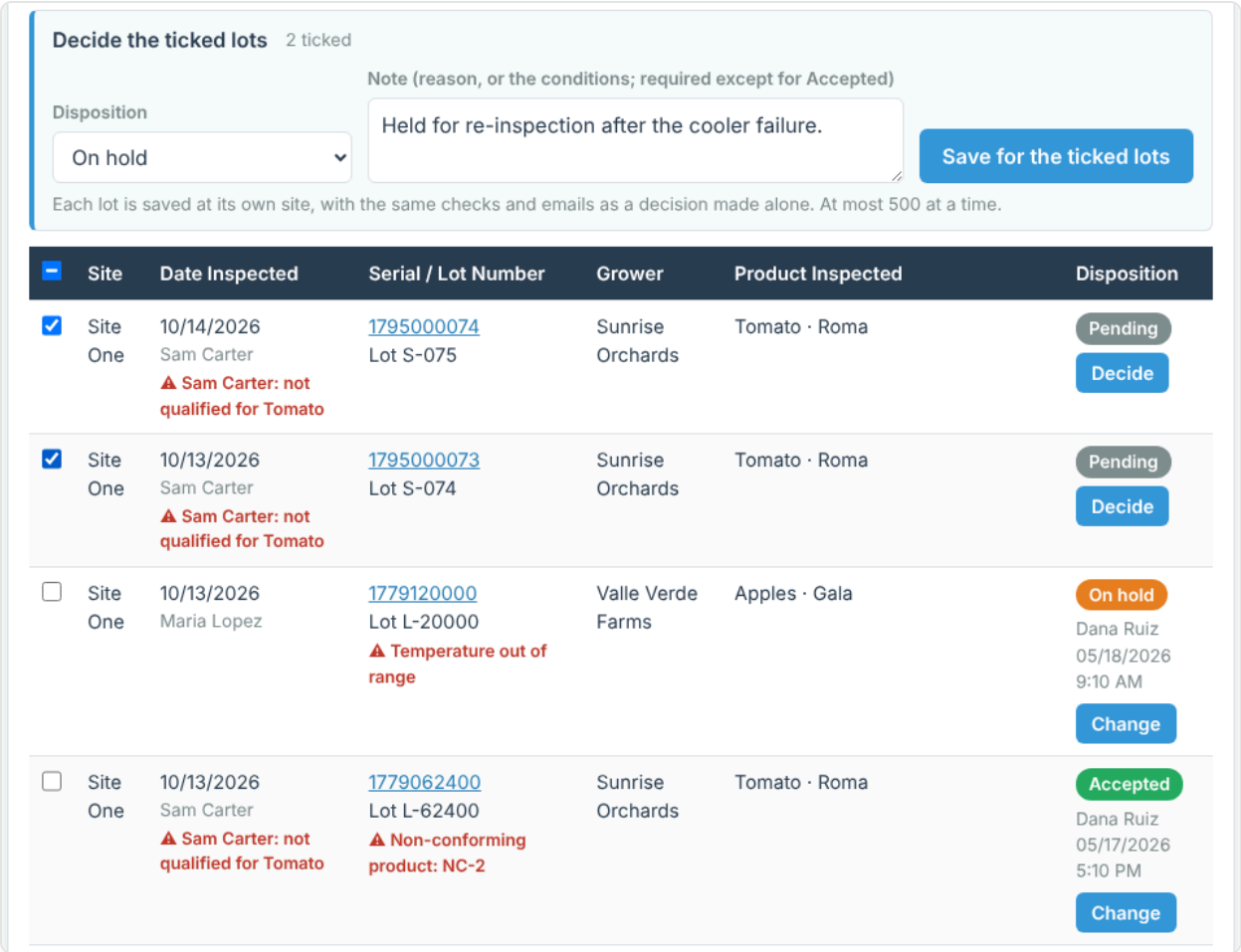
> **Tip:** A lot packed while a food-contact swab point was positive shows Packed while positive: EM-3 under its lot number, and the positive in the window where you decide, until what was done with the product is recorded on the positive (see 6.40).

MANY SITES, AND MANY LOTS AT ONCE

With more than one site, the Site list also offers All my sites, a site group, Choose sites… and your views (see 6.68): the lots of those sites are listed together, with a Site column, 50 a page. Each lot is decided at its own site.

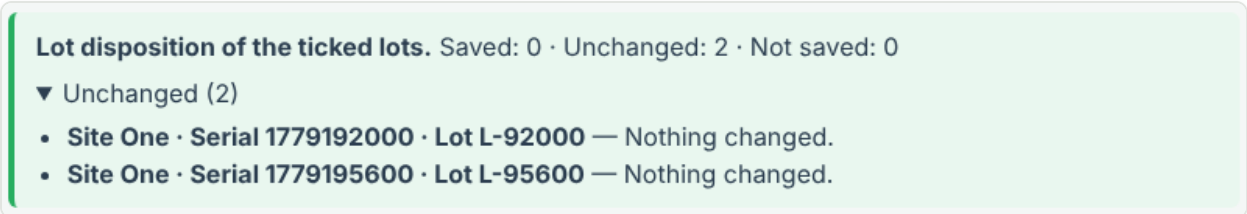
Someone with more than one site, such as a Quality Control Manager of several sites, can also decide many lots together:

1. Tick the lots in the list (the box in the heading ticks every lot shown). Decide the ticked lots, above the list, says how many are ticked.
2. Choose the Disposition and write the Note (reason, or the conditions; required except for Accepted).
3. Select Save for the ticked lots and confirm (Save this disposition for N lots? Each is emailed as a single decision is.).



Two lots ticked, to put on hold together

Each lot is checked, saved and emailed at its own site exactly as a decision made alone, at most 500 at a time. The page then says what was done: Lot disposition of the ticked lots. Saved: N · Unchanged: N · Not saved: N, with the lots under Not saved, and why (such as Lot disposition is off for this site.), Saved and Unchanged (Nothing changed.).

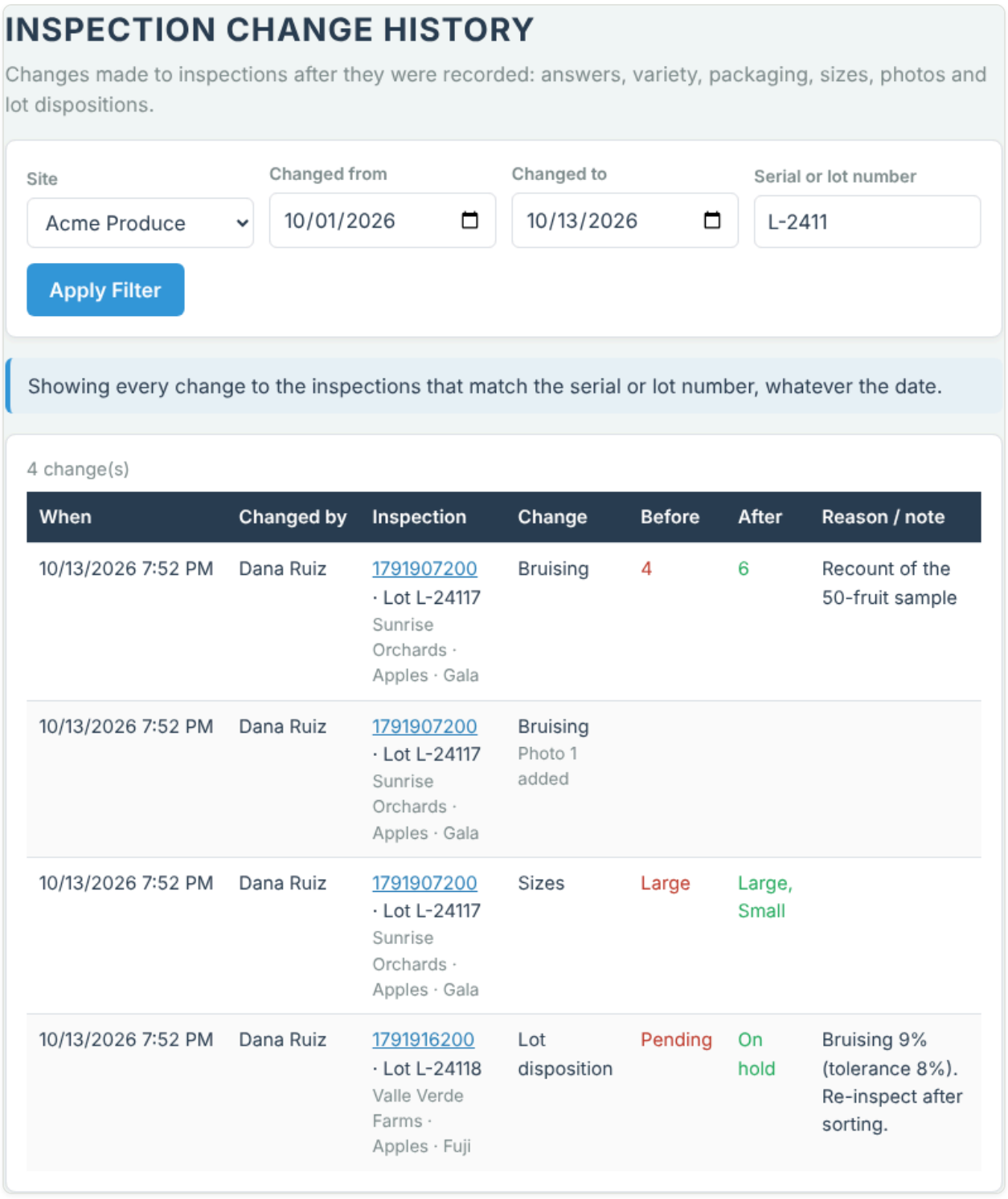


What was done: two other lots, already Accepted, saved again as Accepted

6.8 Inspection Change History

Inspection Change History lists every change made to inspections after they were recorded, newest first: answers (including the grower), variety, packaging, sizes, photos added, replaced, or deleted, lot dispositions, sign-offs and withdrawn sign-offs (see 6.16), and, for Quality Control Managers, the steps of corrective actions, customer claims and grower action requests (see 6.19) linked to an inspection. Each change shows the value before and after, who made it, when, and the reason or note. Quality Control Managers see their own sites; Administrators see every site.

1. Go to Lots > Inspection Change History.
2. Choose the Site, or All my sites, and the Changed from / Changed to dates (up to 13 months), or enter a serial or lot number to see every change to those inspections. Select Apply Filter.
3. Quality Control Managers can select a serial number to open the inspection in Edit Quality Inspections.



Inspection Change History

> **Tip:** On Edit Quality Inspections, the Change history link under the inspection opens this page for that inspection.

6.9 Corrective Actions

A corrective action follows a problem until it is fixed at the source: who owns it, by when, why it happened, what was done, and whether it worked. It can come from an inspected lot, for example one that was rejected or put on hold, or from somewhere else, such as a customer complaint or an audit.

RAISING A CORRECTIVE ACTION

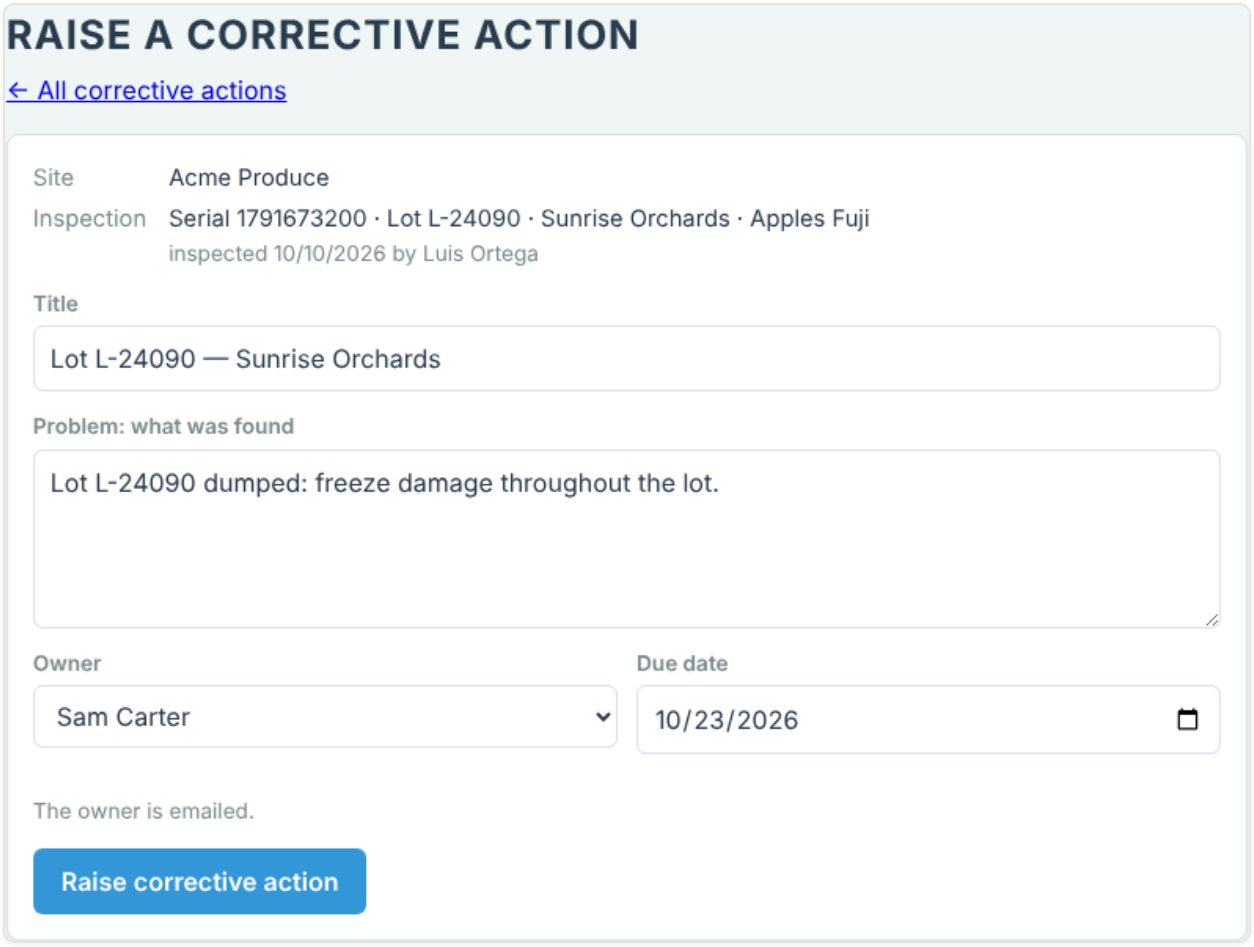
1. From a lot: in the Lot Disposition window, or under the inspection on Edit Quality Inspections, select Raise corrective action. Otherwise go to Problems > Corrective Actions and select Raise corrective action (Quality Control Managers then choose the site).
2. From a customer claim: select Raise corrective action on the claim (see 6.10). The form is filled in from the claim, and the two are linked.
3. From a failed calibration: select Raise corrective action under the calibration (see 6.12). The form is filled in from the readings, and the two are linked.
4. From a management review action: on a closed review, select Continue as a corrective action under the action (see 6.20). The form is filled in from the action, with the source Management review, and the two are linked.
5. From a failed shelf-life sample: select Raise corrective action on the sample (see 6.23). The form is filled in from the failed check, with the source Inspection / lot, and the two are linked.
6. From a quality objective off track: select Raise a corrective action under the month’s explanation (see 6.27). The form is filled in from the explanation, with the source Quality objective, and the two are linked.
7. From a mock recall: select Raise a corrective action on a finished exercise (see 6.28). The form is filled in from its result, what was found and what will change, with the source Mock recall, and the two are linked.
8. From an audit finding: open the finding and select Raise a corrective action instead (see 6.29). The form is filled in from the finding, with the source Internal audit; the finding is then followed up as the corrective action, and the two are linked.
9. From an external audit’s non-conformance: open it and select Raise a corrective action for its root cause (see 6.30). The form is filled in from the

non-conformance, with the source External audit, and the two are linked; the non-conformance is still answered and sent to the auditor as usual.

10. From a change that didn’t work: on the change, after a check found it didn’t work, select Raise a corrective action for its cause (see 6.31). The form is filled in from the change and the check, with the source Change control, and the two are linked. A corrective action can also lead to a change: select Propose a change under Changes on the corrective action, and the request starts from it.
11. From a non-conforming product record: select Raise a corrective action on the record (see 6.35). The form is filled in from the record, with the source Non-conforming product, and the two are linked.
12. From a risk on the register (Quality Control Managers): select Raise a corrective action on the risk (see 6.36). The form is filled in from the risk, with the source Risk register, and the two are linked.
13. From an environmental monitoring positive: select Raise a corrective action on the positive (see 6.40). The form is filled in from the positive, with the source Environmental monitoring, and the two are linked.
14. From a pre-op check: select Raise a corrective action on a check where an item failed (see 6.41). The form is filled in from the check, with what failed and how it ended, with the source Sanitation, and the two are linked.
15. From a label check: select Raise a corrective action on a wrong label (see 6.42). The form is filled in from the check, with what was wrong, the codes read, how it ended, the lot and what was done with the product, with the source Label checks, and the two are linked.
16. From a wash water check: select Raise a corrective action on a check out of range (see 6.43). The form is filled in from the check, with each reading and what was out of range, what was done to the water, the lot, what was done with the product and why it was closed, with the source Wash water, and the two are linked.
17. From a load inspection: select Raise a corrective action on a load rejected or released with problems (see 6.44). The form is filled in from the load, with its problems, the checklist items that failed, the pulp temperatures out of range, the reefer’s reading and why it was rejected or released, with the source Load inspections, and the two are linked.

18. From a supplier review: select Raise a corrective action on a review that approved a supplier with conditions or suspended it (see 6.45). The form is filled in from the review, with the supplier and its category, the decision, the conditions, the documents missing or expired and why, with the source Approved suppliers, and the two are linked.
19. From a metal detector check: select Raise a corrective action on a failed check (see 6.46). The form is filled in from the check, with each test and what failed, the lot, what was done with the product since the last passed check and why it was closed, with the source Metal detection, and the two are linked.
20. From a net weight check: select Raise a corrective action on a failed check (see 6.47). The form is filled in from the check, with the pack's declared weight, tare and lowest allowed, what was weighed, why it failed, the lot and line, what was done with the product and how it ended, with the source Net weight, and the two are linked.
21. From a glass or brittle plastic breakage: select Raise a corrective action on the breakage (see 6.48). The form is filled in from the breakage, with what broke, where and when, what happened, the product exposed and the lots, what was done with the product and the cleanup, with the source Glass and brittle plastics, and the two are linked.
22. From a failed water test result: select Raise a corrective action on the result (see 6.49). The form is filled in from the result, with the water source and what its water is used for, the test, when it was sampled and reported and by which lab, the result and its limit, and what was done, with the source Water testing, and the two are linked.
23. From a work order: select Raise a corrective action on the work order (see 6.50). The form is filled in from the work order, with its number, when and by whom it was requested, where, what was to be done, the work done, the temporary repair, the times it was sent back and the hygiene clearance, with the source Maintenance, and the two are linked.
24. From a field assessment: select Raise a corrective action on an assessment that didn't approve the field or approved it with conditions (see 6.53). The form is filled in from the assessment, with the field and its commodity, the day, who assessed it and its number, the outcome, the risks found with what was seen, the conditions and why, with the source Field audits, and the two are linked.

25. From a food defense incident: select Raise a corrective action on the incident (see 6.54). The form is filled in with the incident’s number, kind and day only, with the source Food defense, and the two are linked: everyone with Corrective Actions sees a corrective action and its owner gets it by email, so the incident’s details stay on Food Defense, and you write what the owner needs to know.
26. For one that is not raised from a lot, a claim, a calibration, a review action, a shelf-life sample, an objective, a mock recall, an audit finding, a non-conformance, a change, a non-conforming product record, a risk, a positive swab, a pre-op check, a wrong label, a wash water reading out of range, a load with problems, a supplier review, a failed metal detector check, a failed net weight check, a glass or brittle plastic breakage, a failed water test, a work order, a field assessment or a food defense incident, choose the Source: Customer complaint, Audit, Grower / supplier, Equipment / calibration, or Other. You can also enter the serial or lot number of the inspection it is about.
27. Enter a Title and the Problem, choose the Owner and the Due date, and select Raise corrective action.



Raising a corrective action from an inspected lot

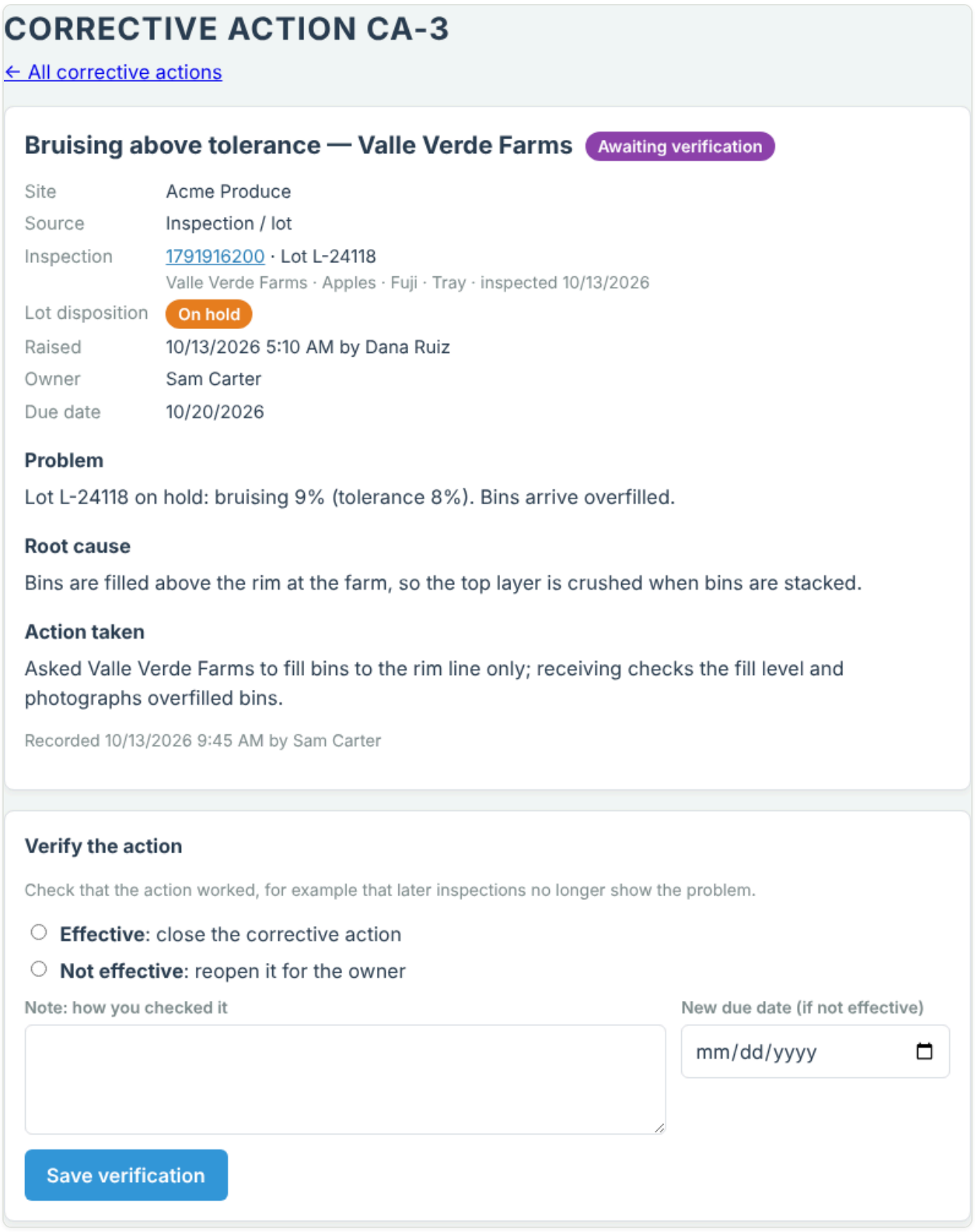
> **Note:** The owner is emailed from the site's email account, in the owner's language. Owners are the site's Quality Control Managers and its Users with the Corrective Actions permission. No email is sent when you assign yourself, when the owner has no email address, or when the site's email account isn't set up; the message after saving says so.

RECORDING THE ROOT CAUSE AND ACTION

The owner opens the corrective action from Problems > Corrective Actions (Assigned to me lists their own), enters the Root cause (why it happened) and the Action taken (what was done so it does not happen again), and selects Submit for verification. The status becomes Awaiting verification.

VERIFYING AND CLOSING

A Quality Control Manager checks that the action worked, for example that later inspections no longer show the problem. They choose Effective or Not effective, enter a note on how they checked it, and select Save verification. Effective closes the corrective action. Not effective reopens it for the owner, with a new due date if needed (required when the old one has passed).

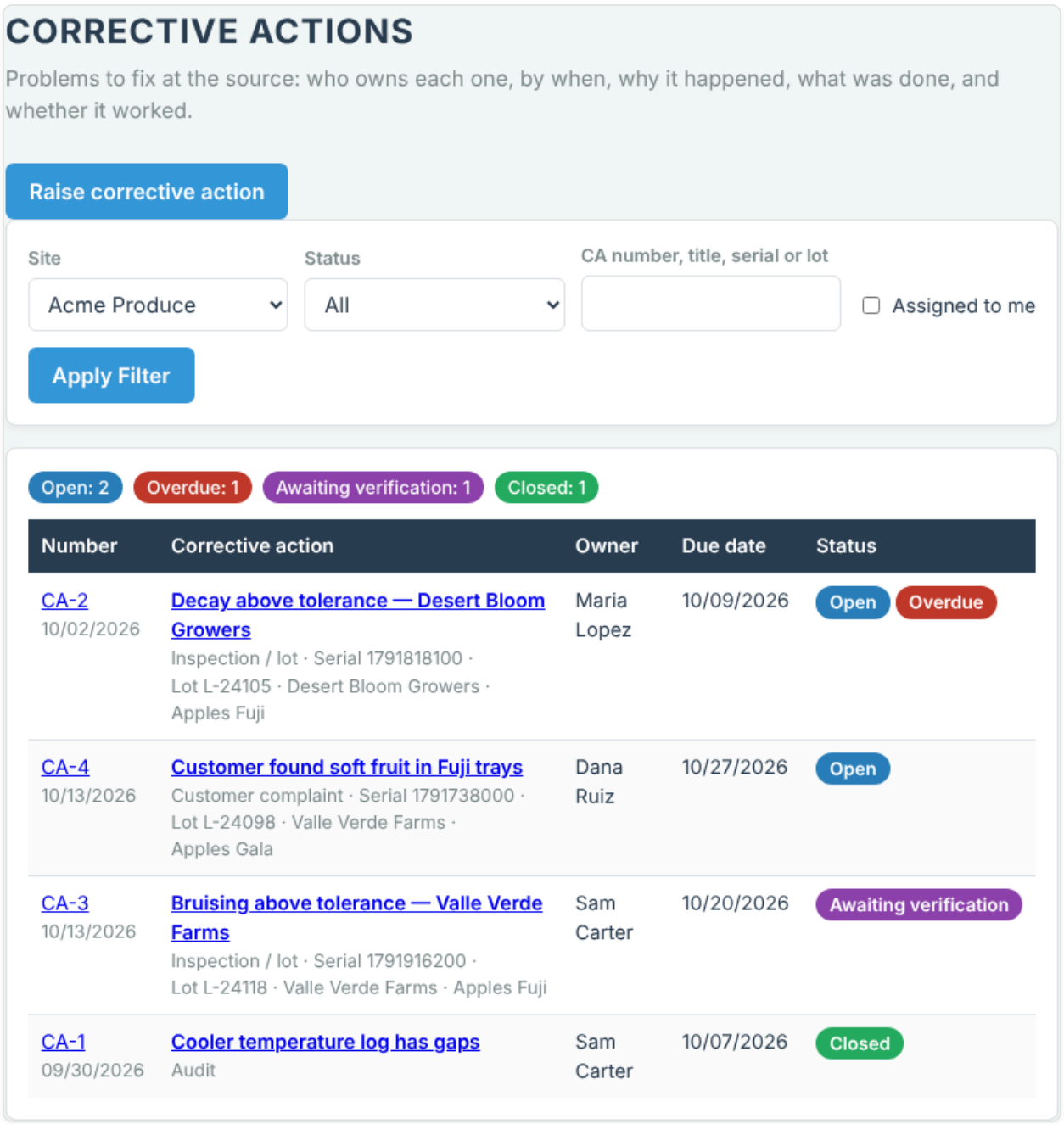


A corrective action awaiting verification

Status	Meaning
Open	The owner is working on it.
Overdue	Open and past its due date. It is flagged on the list; no email is sent.
Awaiting verification	The owner recorded the root cause and the action; a Quality Control Manager needs to verify it.
Closed	Verified as effective.
Cancelled	Raised by mistake or no longer needed. Only Quality Control Managers can cancel, with a reason.

THE CORRECTIVE ACTIONS LIST

Problems > Corrective Actions lists the corrective actions that are not closed, overdue and earliest due first. Filter by Status, Site (Quality Control Managers can choose All my sites), Assigned to me, or a CA number, title, serial or lot number. Selecting one of the colored counts at the top shows those corrective actions.



Corrective Actions list

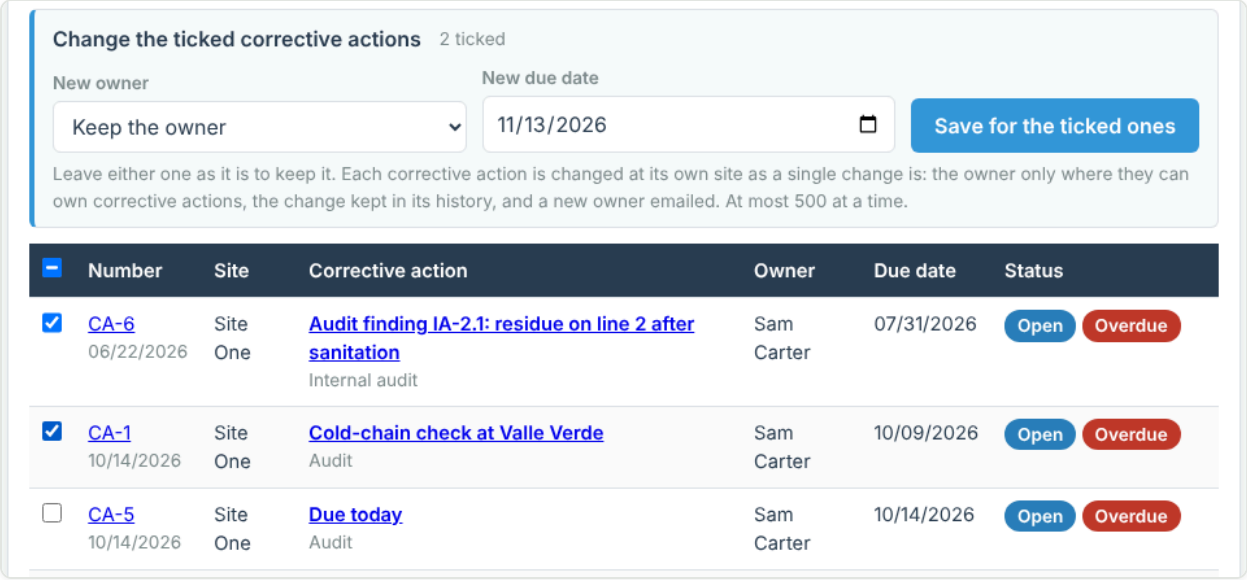
> **Tip:** Quality Control Managers and whoever raised a corrective action can change its owner, due date, title and description until it is closed (Change the owner, due date or description); a new owner is emailed. Every step is kept in the History at the bottom of the page. The steps of corrective actions raised from an inspection also appear in Inspection Change History (6.8).

> **Note:** Give Users the Corrective Actions permission on gear > Users > Add / Change User Permissions; they see it after they next sign in. Quality Control Managers have it already.

CHANGING MANY AT ONCE

With more than one site, the list can show all your sites, a site group, sites chosen or a view (see 6.68), with a Site column. Someone with more than one site can give many corrective actions a new owner or a new due date together:

1. Tick the corrective actions in the list: those open or awaiting verification that you may change (as a Quality Control Manager of their site, or because you raised them) have a box.
2. Under Change the ticked corrective actions, choose the New owner, or leave Keep the owner, and the New due date, or leave it empty.
3. Select Save for the ticked ones and confirm (Change N corrective actions?).



A new due date for two corrective actions

Each corrective action is changed at its own site as a single change is: the new owner only where they can own corrective actions, the change kept in its history, and a new owner emailed; at most 500 at a time. When the new owner can't own the actions of some ticked sites, the form warns before saving (… cannot own corrective actions at the site of N of the ticked ones; those will not be changed.).

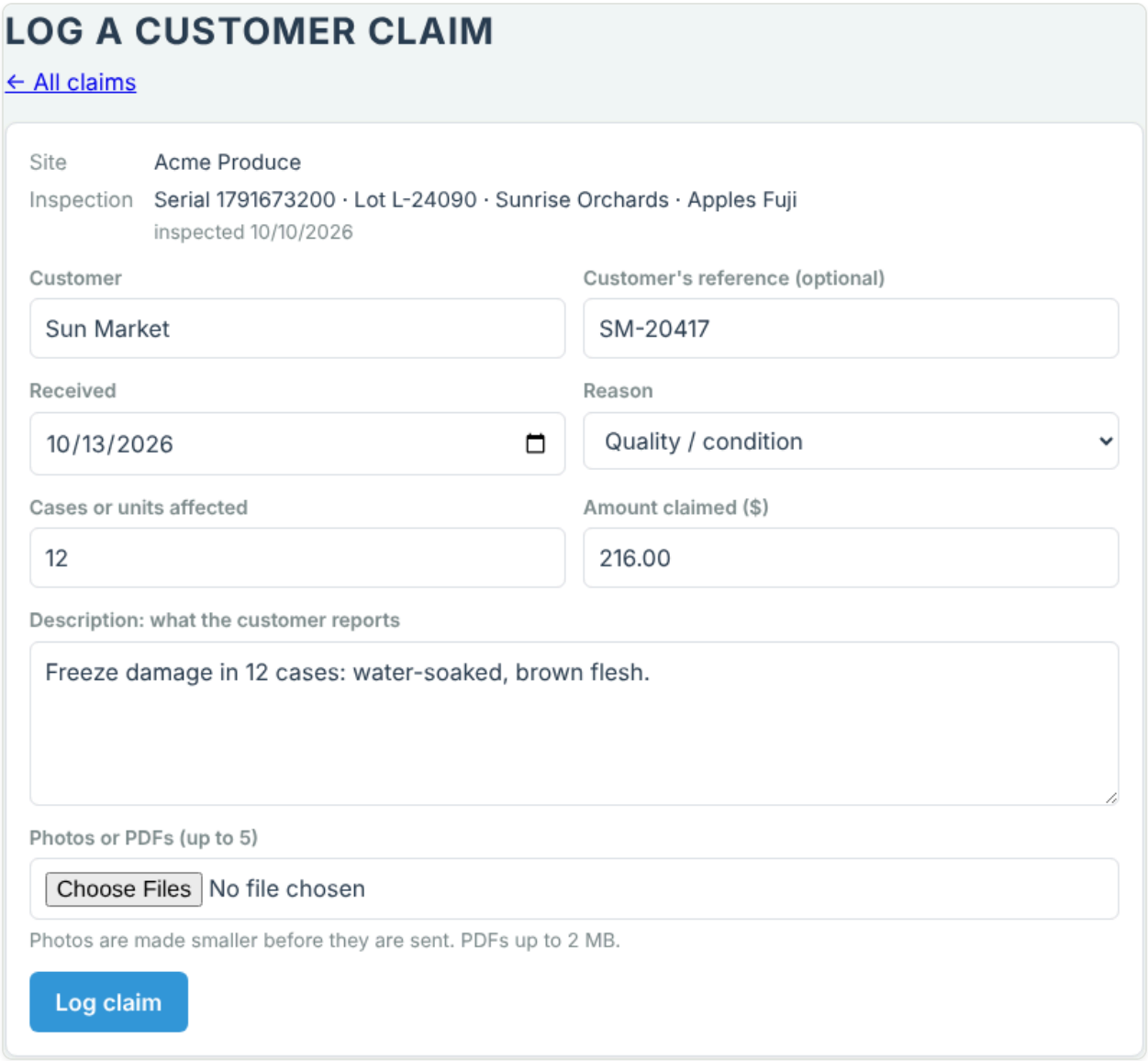
The page then says Corrective actions ticked. Saved: N · Unchanged: N · Not saved: N, with the reasons, such as The due date cannot be in the past. or Someone else changed this corrective action after the list was shown. Open it to see it.

6.10 Customer Claims

Customer Claims records customers' complaints about product they received (the lot, what they claim, their photos and documents) and what was decided. Claims are kept per site: Quality Control Managers see the claims of their sites, and Users with the Customer Claims permission see their own site's.

LOGGING A CLAIM

1. From a lot: in the Lot Disposition window, or under the inspection on Edit Quality Inspections, select Log a claim. Otherwise go to Problems > Customer Claims and select Log a claim (Quality Control Managers then choose the site).
2. Enter the Customer (names used on earlier claims at the site are suggested as you type, with the site's customers from Customer Specifications first), the customer's reference if they gave one, the date Received, and the Reason.
3. For a claim not logged from a lot, you can enter the serial or lot number of the inspection it is about.
4. Enter the Cases or units affected, the Amount claimed and a Description, add up to 5 photos or PDFs, and select Log claim.



Logging a claim for an inspected lot

> **Note:** Photos are made smaller before they are sent and are stored as JPEG. The largest PDF the server accepts is shown under the files box. Amounts use a decimal point, for example 1250.50; a comma is only accepted as a thousands separator (1,250.50).

THE CLAIM PAGE

Selecting a claim opens it with its details, photos and documents, the decision once there is one, and its history. While the claim is open, anyone with the Customer Claims permission can change its details (Change the claim details) and

add files. A file can be removed by whoever added it or by a Quality Control Manager.

> **Note:** A claim whose Reason is Food safety asks Food safety: a risk to health? on its page. Anyone with Customer Claims answers it while the claim is open (a Quality Control Manager also later) under Record it: Could the product be a risk to health? Yes or No and, if yes, whether the regulator was Told (the agency, the CFIA or the FDA to start with, the day and time, their reference), is Not needed (say why) or Not yet. Until it is answered (while the claim is open), and while a risk isn't recorded as told, the claim says so in red, on its page and on the list, and the QA Dashboard's Customer claims tile counts them (6.14). Start a recall starts one from the claim (6.39). Each answer is kept in the claim's history.

CLAIM CL-3

← All claims

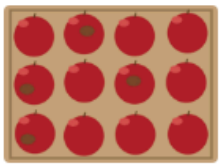
FreshMart Distribution Open

Site	Acme Produce
Customer's reference	PO-5531
Received	10/13/2026
Reason	Quality / condition
Inspection	1791916200 · Lot L-24118 Valle Verde Farms · Apples · Fuji · Tray · inspected 10/13/2026
Cases or units affected	40
Amount claimed	$1,250.50
Logged	10/13/2026 3:15 PM by Sam Carter

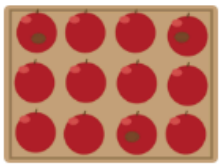
Description

Bruising and soft fruit in 40 of 120 cases on arrival in Phoenix. Customer photos and their inspection report attached.

Photos and documents



claim_tray1.jpg
79 KB · Sam Carter
Remove



claim_tray2.jpg
79 KB · Sam Carter
Remove

PDF

FreshMart inspection report.pdf
1 KB · Sam Carter
Remove

Photos or PDFs (up to 2)

Choose Files No file chosen

Photos are made smaller before they are sent. PDFs up to 2 MB.

Add files

Raise corrective action

A customer claim with the customer's photos and report

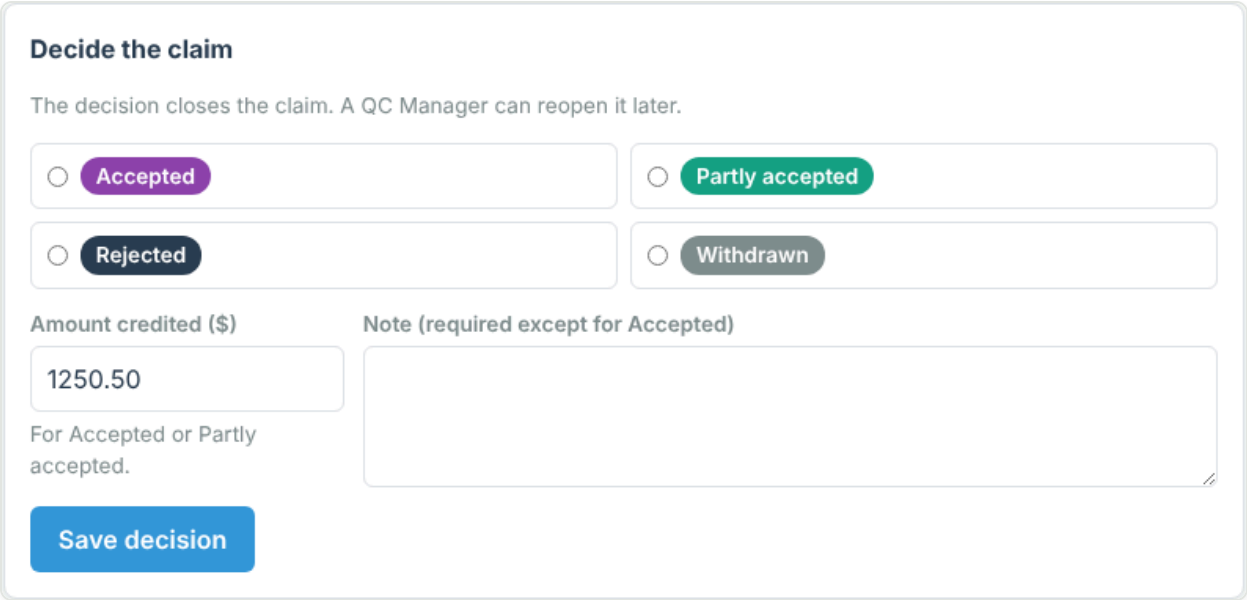
Note: For a claim about a lot, Customer's spec shows whether the lot met that customer's spec (the version in force on the inspection date) and whether it was recorded as going to them, by hand or on a shipment (see 6.70), with the reason if it went anyway. It shows to those with the Customer Specifications permission (see 6.24).

Note: Quality certificate, on a claim about a lot, lists the lot's certificates for the claim's customer, the one in force first, with the result each showed. Select one to open it. It shows to those with the Quality Certificates permission (see 6.25).

Note: When a claim shows that product already sold must come back, a Quality Control Manager selects Start a recall on the claim: the recall starts with the claim's lot and customer, and the claim then shows it (see 6.39).

DECIDING A CLAIM

Quality Control Managers decide a claim under Decide the claim: choose the decision, enter the Amount credited (for Accepted or Partly accepted) and a note, and select Save decision. The decision closes the claim. If needed, a Quality Control Manager can reopen it with Reopen this claim; the earlier decision stays in the history.



Deciding a claim

Decision	Use it when
Accepted	The claim is valid in full. The amount credited is the amount claimed unless you enter less.
Partly accepted	Part of the claim is valid. Enter the amount credited (less than the amount claimed) and why.
Rejected	The claim is not valid, for example the problem happened after the product left. Say why in the note.
Withdrawn	The customer withdrew the claim. Say what happened in the note.

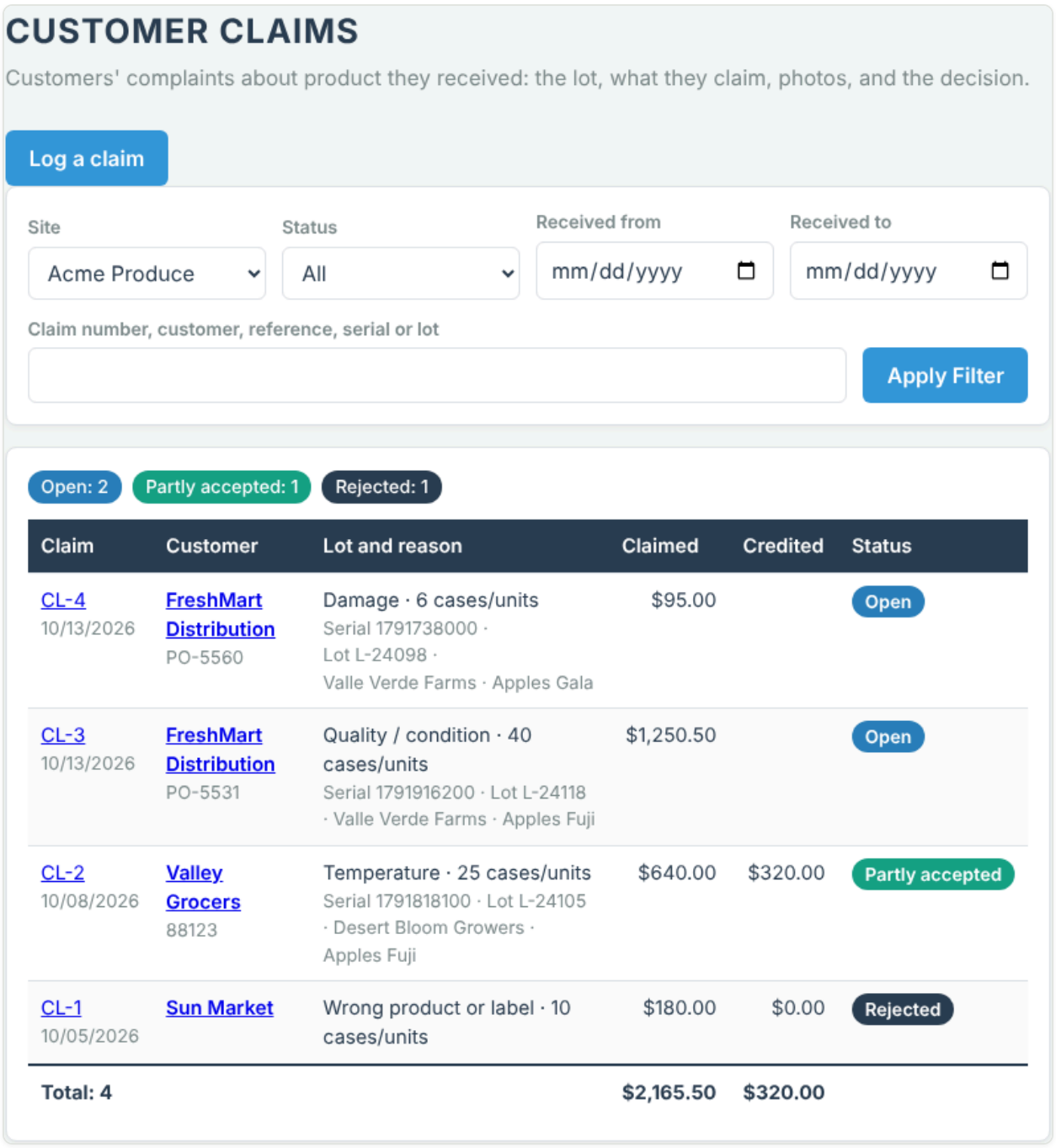
Tip: Select Raise corrective action on a claim to start a corrective action from it (see 6.9). The form is filled in from the claim, and the claim and the corrective action link to each other.

Tip: Select Request action from the grower on a claim to ask the grower of the claimed lot for the cause and what they are doing about it (see 6.19). The claim lists its requests.

> **Tip:** Select Log non-conforming product on a claim to record the product the claim is about: the record starts from the claim's lot and description, and the claim lists its records (see 6.35).

THE CLAIMS LIST

Problems > Customer Claims lists the open claims, newest received first. Filter by Status (Open, Closed, or a decision), Received from / Received to, Site (Quality Control Managers can choose All my sites), or a claim number, customer, customer's reference, serial or lot number. Selecting one of the colored counts shows those claims, and the last row totals the amounts claimed and credited for the claims that match.



Customer Claims list with totals

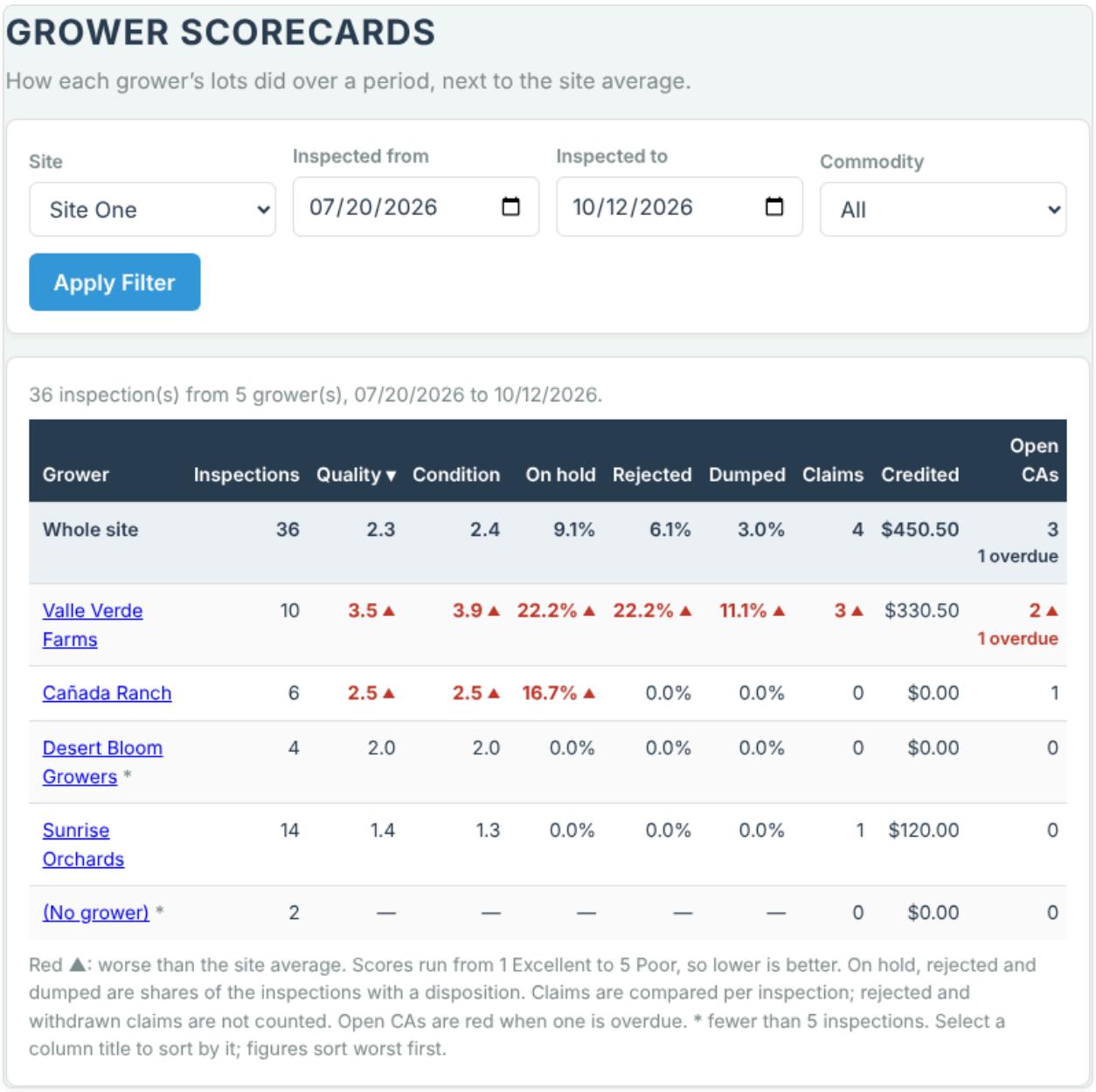
> **Note:** Give Users the Customer Claims permission on gear > Users > Add / Change User Permissions; they see it after they next sign in. Quality Control Managers have it already. Only Quality Control Managers can decide and reopen claims.

6.11 Grower Scorecards

Growers > Grower Scorecards compares growers over a period: each grower's inspections, average quality and condition scores, lot dispositions, customer claims and corrective actions, next to the site average. Figures worse than the site average are shown in red with a ▲, so the growers to talk to stand out. The page only reads what is already recorded; it changes nothing. To be told when a grower's figures get worse, see Trend Alerts (6.13).

CHOOSING WHAT TO SEE

1. Go to Growers > Grower Scorecards.
2. Quality Control Managers choose the Site. Users see their own site.
3. Change Inspected from and Inspected to if needed (the last 90 days to start with, up to 13 months at a time), choose a Commodity to compare like with like, and select Apply Filter.



Grower Scorecards, sorted by quality score

READING THE FIGURES

The Whole site row at the top gives the site's figures for the same dates. A figure in red with a ▲ is worse than the site average. An asterisk (*) after a grower's name means fewer than 5 inspections, so the figures may not be typical. Select a column title to sort by it, worst first; on a phone, use Sort by.

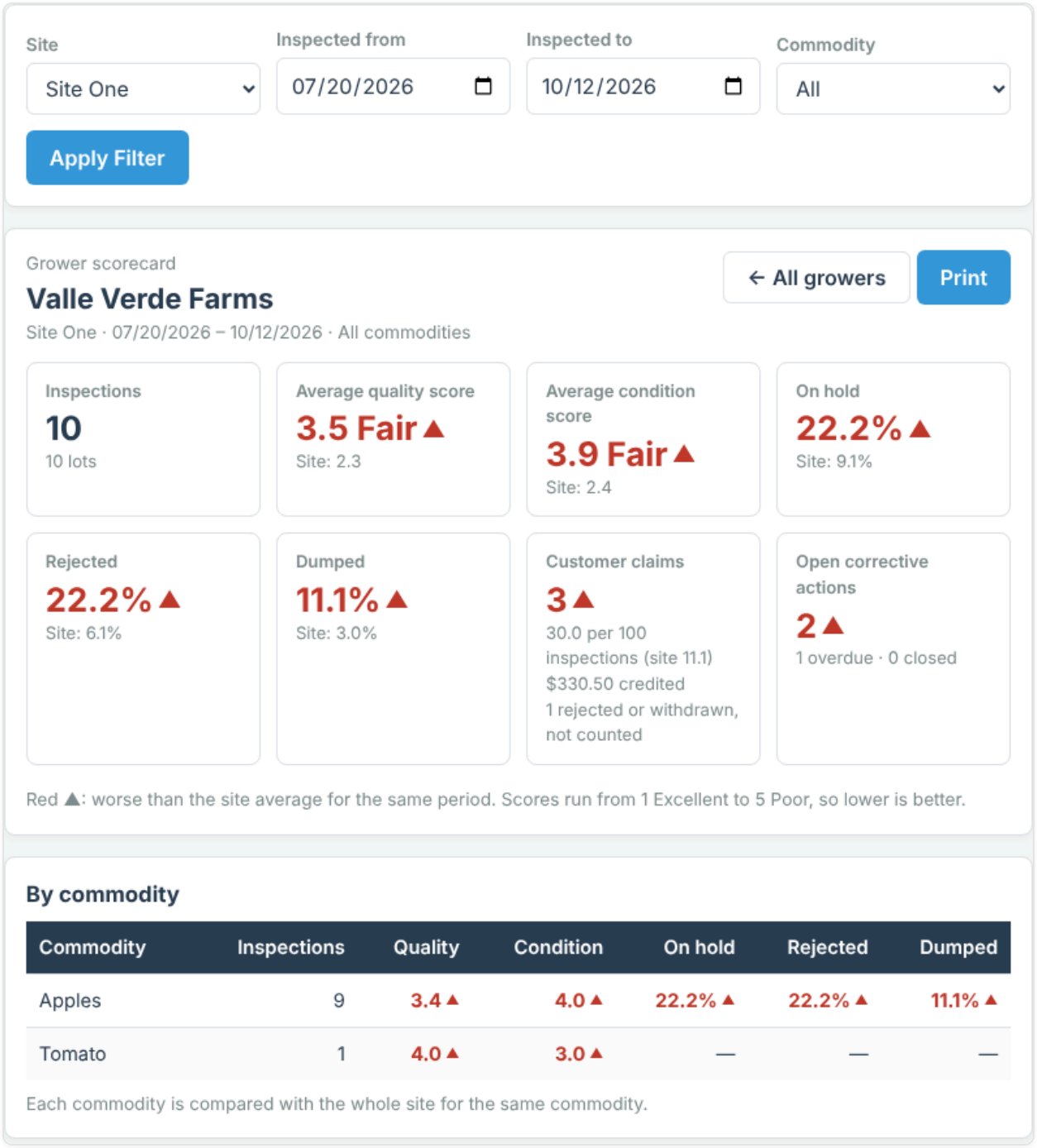
Column	What it shows
Inspections	How many of the grower's inspections fall in the dates (and commodity) you chose.
Quality, Condition	The average answer to the questions whose unit of measure is Quality score or Condition score. The scores run from 1 Excellent to 5 Poor, as on the inspection reports, so a lower average is better. Only answers 1 to 5 count; a blank or any other answer is left out.
On hold, Rejected, Dumped	Of the grower's inspections that have a lot disposition (see 6.7), the share put on hold, rejected or dumped. Inspections without a disposition (still pending, or from before lot disposition was turned on) are left out.
Claims, Credited	Customer claims about the grower's lots (see 6.10) and the amount credited. Claims are compared with the site per inspection. Rejected and withdrawn claims are listed on the scorecard but not counted.
Open CAs	Corrective actions raised from the grower's lots (see 6.9) that are open or awaiting verification, with how many are overdue.

Note: The On hold, Rejected and Dumped columns show only for people who also have the Lot Disposition permission, Claims and Credited for those with Customer Claims, and Open CAs for those with Corrective Actions. A column with nothing to show, such as Quality when no question uses the Quality score unit of measure, is left out.

ONE GROWER'S SCORECARD

Select a grower's name to open their scorecard; under the name, Approval shows whether the grower is approved (see 6.21), and Shelf life the grower's shelf-life samples kept in the period and their results (see 6.23). The tiles at the top show each figure with the site's underneath. Below them are the figures by commodity (each compared with the site for the same commodity), the lot dispositions, the lots that were not accepted as they were, with the disposition note, the grower's

customer claims and corrective actions, and the action requests issued to the grower in the period (see 6.19). Select a serial number, claim, corrective action or request to open it.



A grower's scorecard

Lot dispositions

Disposition	Inspections	Share	Site
Accepted	4	44.4%	78.8%
Accepted with conditions	0	0.0%	3.0%
On hold	2	22.2% ▲	9.1%
Rejected	2	22.2% ▲	6.1%
Dumped	1	11.1% ▲	3.0%
No disposition	1		

Shares are of the 9 inspection(s) with a disposition; inspections without one (still pending, or from before lot disposition was turned on) are not included.

Lots not accepted as they were

Date Inspected	Serial / Lot Number	Product	Disposition
10/09/2026	1774659600 · Lot L-59600	Apples Gala	On hold — Held for re-inspection: soft fruit and bruising above tolerance.
10/02/2026	1774663200 · Lot L-63200	Apples Fuji	Rejected — Rejected: decay and bruising above the customer specification.
09/11/2026	1774674000 · Lot L-74000	Apples Gala	Dumped — Dumped: decay throughout the lot.
08/28/2026	1774681200 · Lot L-81200	Apples Gala	On hold — Held for re-inspection: soft fruit and bruising above tolerance.
08/21/2026	1774684800 · Lot L-84800	Apples Fuji	Rejected — Rejected: decay and bruising above the customer specification.

The grower's lot dispositions and the lots not accepted as they were

> **Tip:** Select Print for a clean copy without the menu and filter, for example to send to the grower or take to a grower meeting. All growers goes back to the list. Choosing a commodity first compares a grower with the site for that commodity only, which is fairer for growers who ship different products.

> **Note:** Give Users the Grower Scorecards permission on gear > Users > Add / Change User Permissions; they see it after they next sign in. Quality Control Managers have it already.

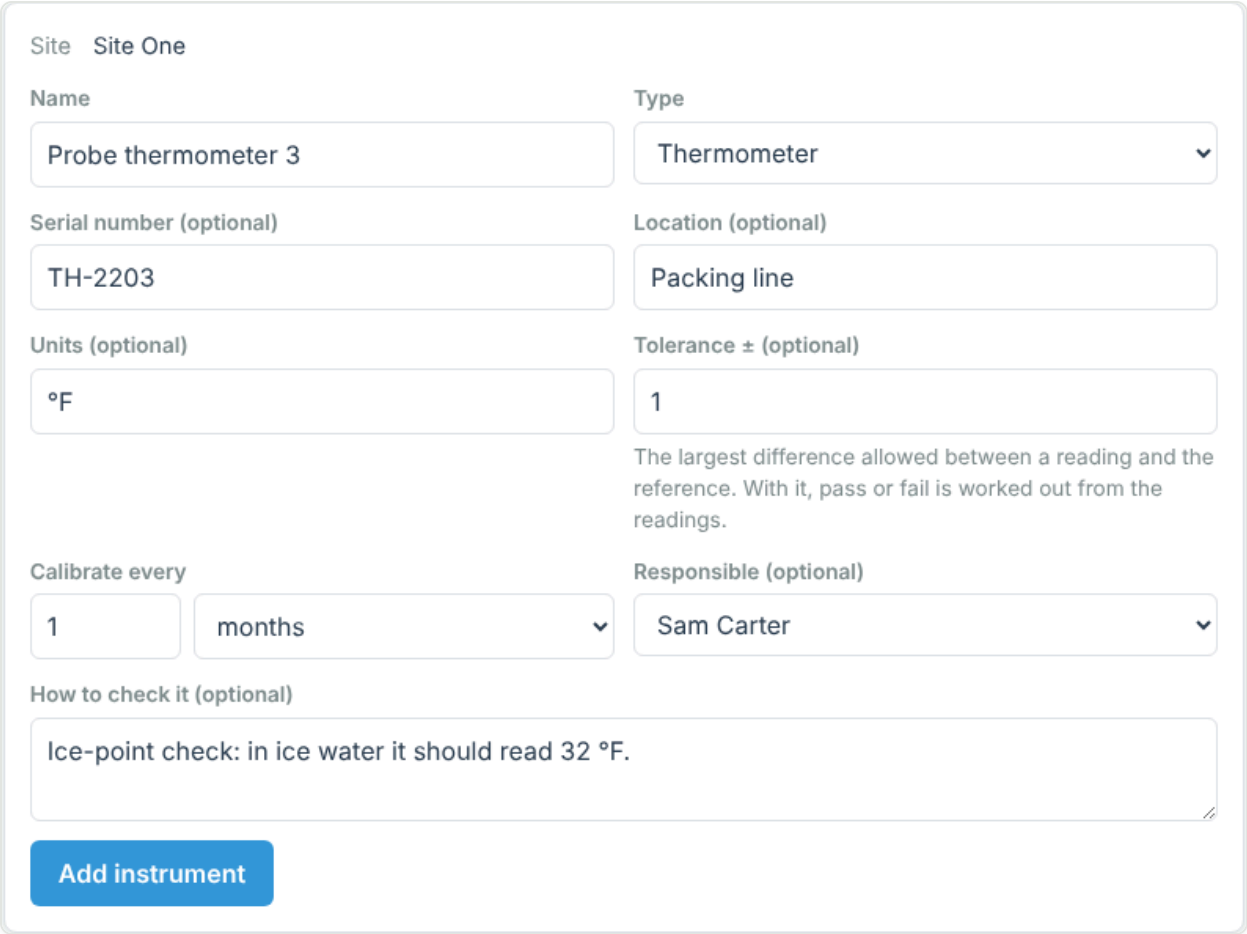
6.12 Calibration Records

Packing house > Calibration Records keeps each site's instruments (thermometers, pressure testers, refractometers, scales and the like) and a record of every calibration: when and how it was done, the readings, whether it passed, and the certificate. It shows which instruments are overdue, due soon or out of service, so the instruments used for inspections stay checked.

ADDING AN INSTRUMENT

Quality Control Managers add the instruments:

1. Go to Packing house > Calibration Records and select Add instrument (choose the site if you have more than one).
2. Enter the Name and Type, and if you like the Serial number, Location and Units.
3. Enter the Tolerance: the largest difference allowed between a reading and the reference value, for example 1 for ±1 °F (or 0.5 for ±0.5 °C). With a tolerance, pass or fail is worked out from the readings.
4. Choose how often to calibrate it (Calibrate every so many days, weeks, months or years), who is Responsible, and How to check it, then select Add instrument.

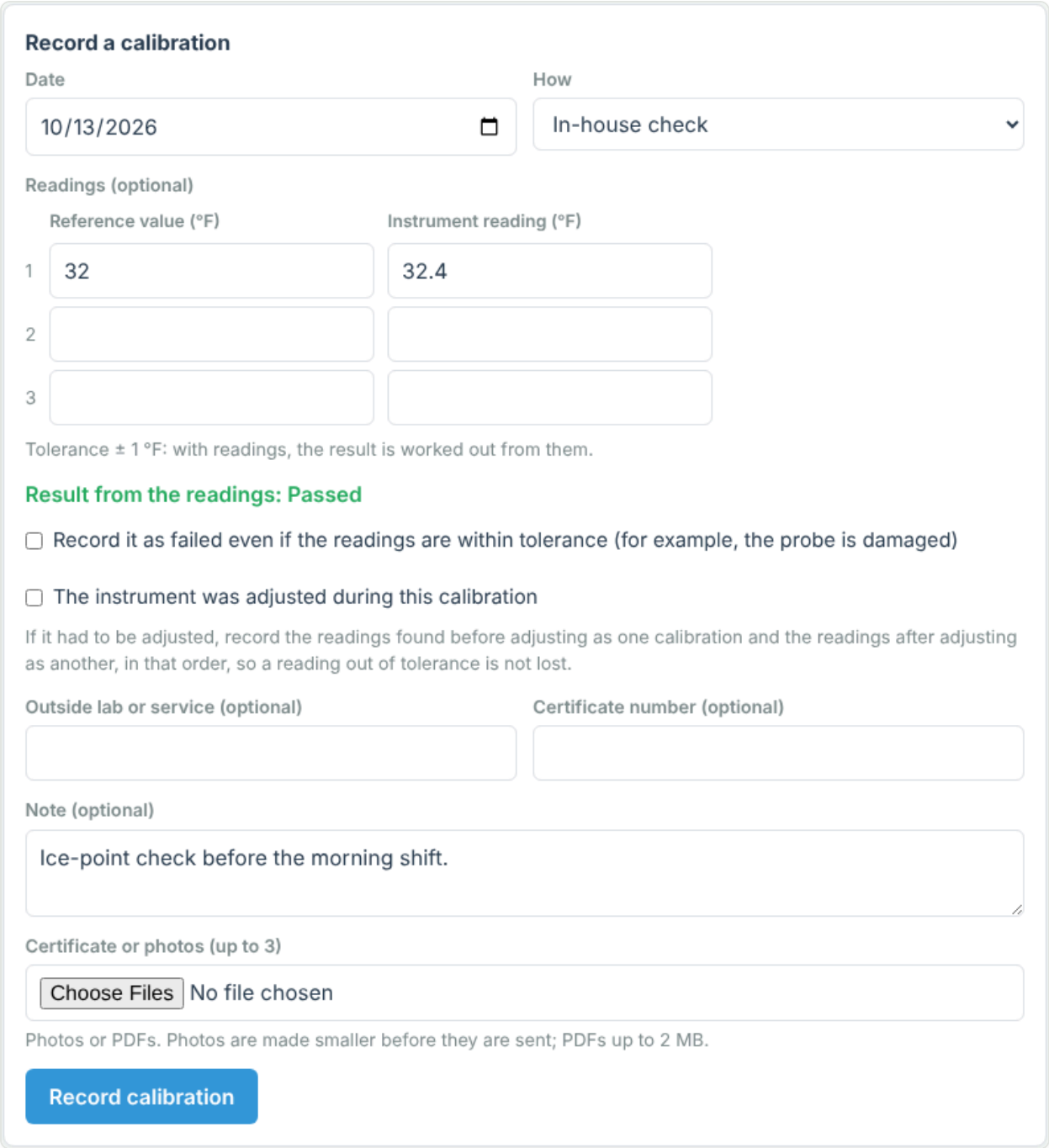


Adding an instrument

RECORDING A CALIBRATION

Anyone with the Calibration Records permission records calibrations at their site. Open the instrument from the list and fill in Record a calibration:

1. Enter the Date, and How it was done: In-house check, or Outside lab or service.
2. Enter up to three Reference values and the Instrument readings, for example reference 32 and reading 32.4 (°F), or 0 and 0.2 (°C), for a thermometer in ice water. When the instrument has a tolerance, the result is shown as you type.
3. With no readings, or no tolerance, choose Passed or Failed.
4. Tick the box if the instrument was adjusted, enter the lab and certificate number if there is one, a note, and up to 3 certificates or photos, then select Record calibration.



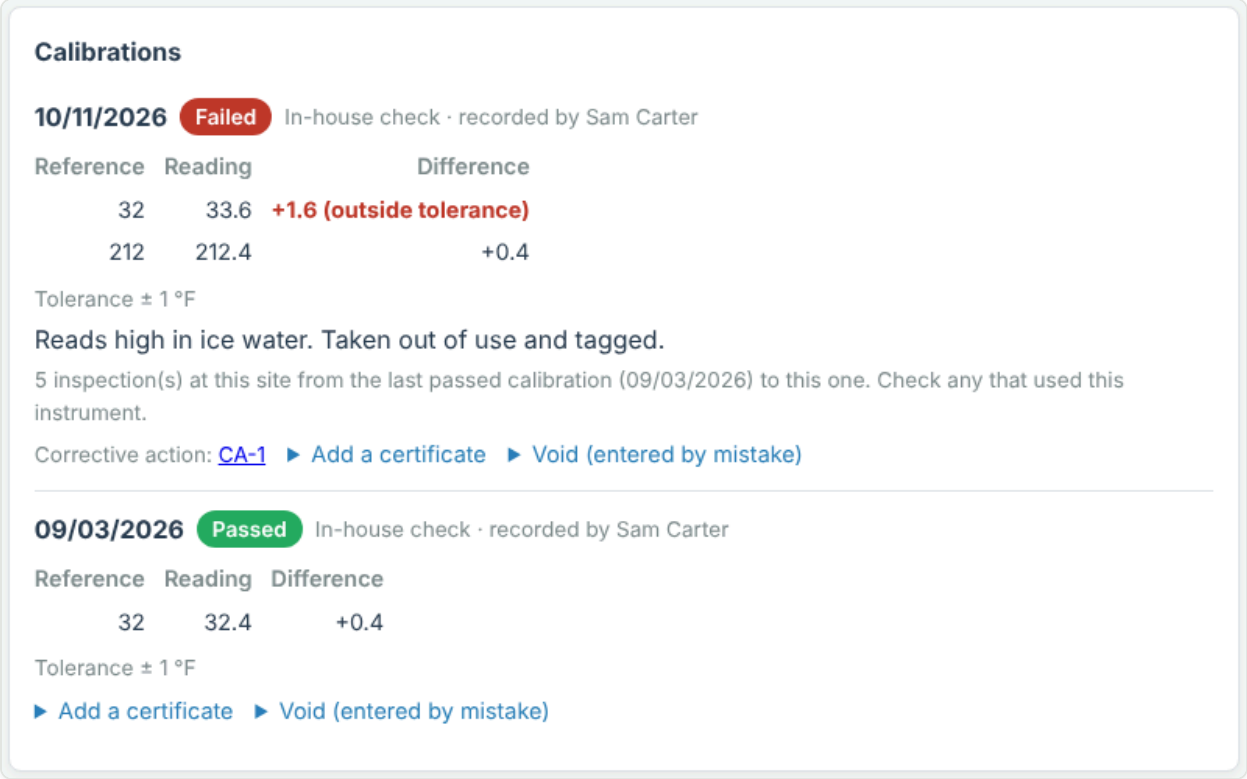
Recording a calibration: the result is worked out from the reading

> **Tip:** If the instrument had to be adjusted, record the readings found before adjusting as one calibration and the readings after adjusting as another, in that order. That way a reading out of tolerance is kept on record.

> **Note:** A reading outside the tolerance is always a fail. To record a fail even though the readings are within tolerance, for example when the probe is damaged, tick Record it as failed even if the readings are within tolerance. Readings take a decimal point (32.5) and at most 4 decimals.

OUT OF SERVICE AND CORRECTIVE ACTIONS

When the newest calibration fails, the instrument shows Out of service until a calibration passes. Under the failed calibration, the page says how many inspections the site did since the last calibration that passed (or since the instrument was added), so you can check any that used the instrument, and offers Raise corrective action, filled in from the readings (see 6.9).

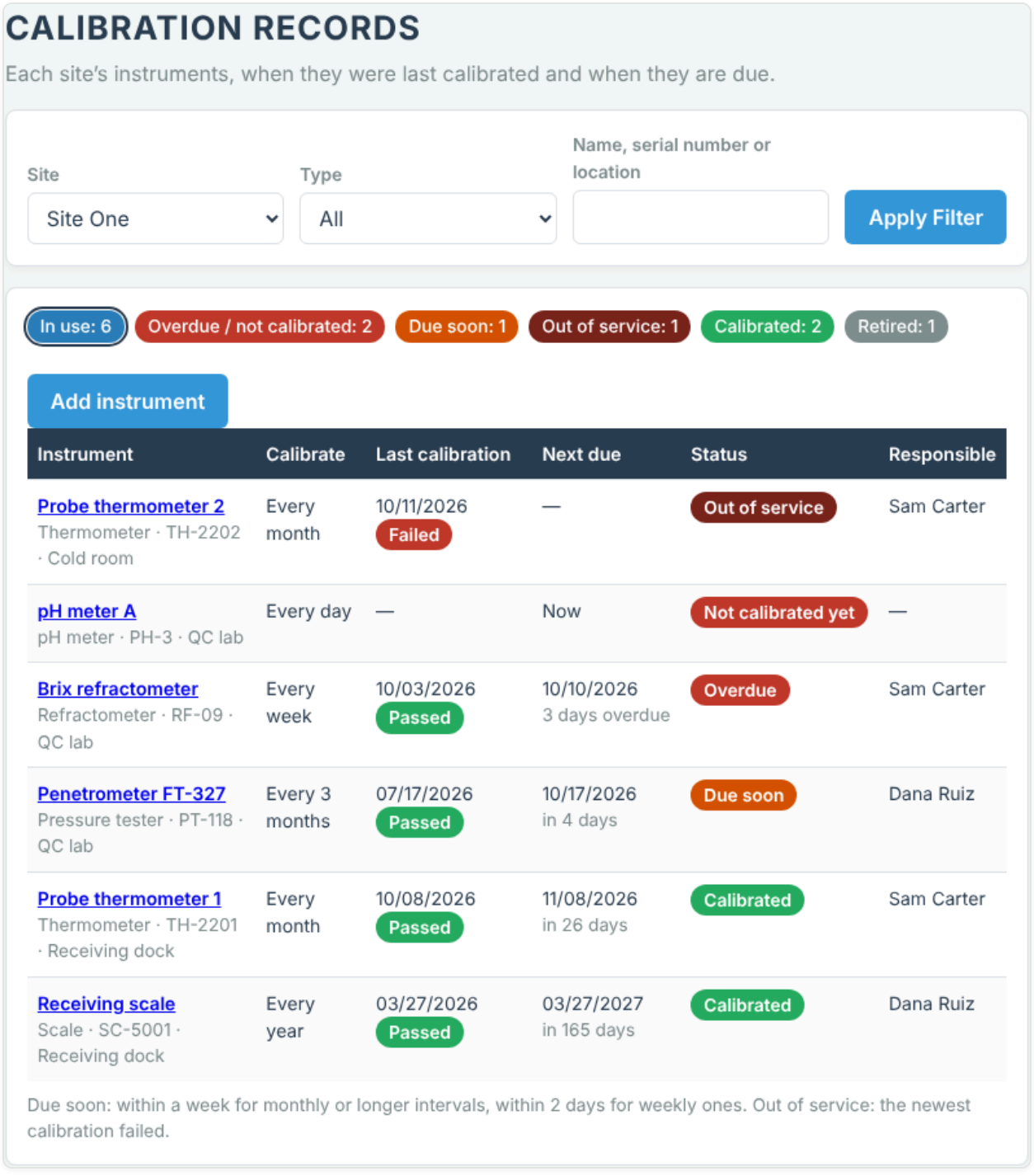


A failed calibration with its corrective action

THE INSTRUMENT LIST

Packing house > Calibration Records lists the instruments in use, the most urgent first: out of service, overdue, due soon, then calibrated. Select one of the colored

counts to see only those (Retired shows the retired ones). Filter by Site, Type, or name, serial number or location.



Calibration Records list

Status	What it means
Calibrated	Its newest calibration passed and it is not due yet.
Due soon / Due today	It is due within a week (for monthly or longer intervals), within 2 days (for weekly ones), or today.
Overdue	Its newest calibration passed, but the interval has gone by.
Not calibrated yet	No calibration has been recorded since it was added. It counts with the overdue ones.
Out of service	Its newest calibration failed. Don't use it until a calibration passes.
Retired	No longer in use, so never due. Its calibrations are kept.

CORRECTIONS AND RETIRING

Quality Control Managers can change an instrument's details (a new tolerance applies to calibrations recorded from then on), void a calibration entered by mistake with a reason (it stays listed but no longer counts), and retire an instrument or put it back in use. Certificates can be added to a calibration later, for example when the lab sends one; whoever added a certificate, or a Quality Control Manager, can remove it while the instrument is in use. Every change is kept in the instrument's History.

> **Note:** Give Users the Calibration Records permission on gear > Users > Add / Change User Permissions; they see it after they next sign in. Quality Control Managers have it already. Only Quality Control Managers add, change, retire and void.

IN THE FOOD SAFETY APP

Calibrations can also be recorded in the Food Safety app (see 6.71). Its Instrument check lists each instrument in use, under its type, with Method (In-house check, or Outside lab or service), up to three points with the reference and the reading, and Result passed? (for an instrument without a tolerance, asking why on No) or

Failed anyway (even within the tolerance) (asking why on Yes); then Adjusted (asking what), the provider, the certificate number and a note. A finished run is a calibration of the instrument; why it failed and what was adjusted go into its note, and up to 3 photos into its files.

In the add and change forms of an instrument, Location in the Food Safety app and Area in the Food Safety app say where the app lists it instead of under its type (see 6.72).

6.13 Trend Alerts

Overview > Trend Alerts tells you what is getting worse at a site before it becomes a habit: a grower's quality or condition scores, more lots held or rejected, repeat customer claims, and corrective actions and calibrations past their due date. Each site is checked every day, each problem shows as one alert while it lasts, and new alerts are emailed to the site's Quality Control Managers.

WHAT RAISES AN ALERT

Alert	When it is raised (default limits)
Quality score worse, Condition score worse	A grower's average quality or condition score over the last 14 days is at least 0.5 worse than over the 90 days before. Scores run from 1 Excellent to 5 Poor, so worse means higher. The grower needs at least 5 inspections in each period.
More lots held or rejected	The share of a grower's inspections put on hold, rejected or dumped over the last 14 days (even if released since) is at least 10 percentage points above the site's usual share (the 90 days before). Each commodity is also compared with its own usual share. Only inspections with a lot disposition count (see 6.7).
Repeat claims	3 or more customer claims received within 30 days about one grower's lots, or from one customer (see 6.10). Rejected and withdrawn claims don't count.
Corrective action overdue	An open corrective action is past its due date (see 6.9).

Alert	When it is raised (default limits)
Calibration overdue	An instrument is past its calibration date, or was added more than one interval ago and has never been calibrated (see 6.12).
Required certificate not current	An active grower's required certificate has expired, or the one on file isn't valid yet (see 6.15).
Certificate expiring	An active grower's certificate runs out within the warning period (30 days by default), and no renewal is on file (see 6.15).
Growers missing a required certificate	One alert for the site, listing the active growers with no certificate on file of a required type (see 6.15).
Inspections not signed off in time	Inspections not signed off within the overdue period (2 days by default), when sign-off is on for the site: one alert for the site, new again when another day falls overdue (see 6.16).
Inspections by inspectors not qualified	Inspections of the last 14 days by someone not qualified for the commodity on the inspection date, when the site checks inspector training: one alert for the site, new again when another inspector or commodity is added to it (see 6.18).
Inspector qualification expiring	An active inspector's qualification runs out within the warning period (30 days by default), and no refresher is on file: one alert for each inspector and commodity (see 6.18).
Grower action request overdue	A request to a grower is not answered by its due date (see 6.19): one alert for each request, new again if it is sent back and overdue again. It follows the overdue switch in Limits.
Management review due or overdue	The site's next management review is due within the reminder period (30 days by default), or is overdue (see 6.20). It follows the overdue switch in Limits.
Management review action overdue	An action decided at a management review is not done by its due date (see 6.20): one alert for each action. It follows the overdue switch in Limits.

Alert	When it is raised (default limits)
Grower approval review due or overdue	An active grower's approval is to be reviewed within the reminder period (30 days by default), or its review date has passed (see 6.21). It follows the switch in the Approved Growers settings.
Lots from growers not approved	Lots of the last 14 days from growers who were suspended or not approved on the inspection date: one alert for the site, new again when another grower is added to it (see 6.21).
Document reviews due or overdue	Controlled documents to be reviewed within the reminder period (30 days by default), or whose review date has passed: one alert for the site, new again when another document is added to it or becomes overdue (see 6.22). It follows the switch in the Controlled Documents settings.
Documents not read in time	People who haven't confirmed reading the newest version of a document by their date: one alert for the site, naming who is late, new again when another person or version is late (see 6.22).
Shelf-life checks overdue	Shelf-life samples whose next check is past its day: one alert for the site, new again when another sample or day is late (see 6.23). It follows the switch in the Shelf Life settings.
Shelf-life sample failed	A sample that failed a check in the last 30 days, with no corrective action raised from it yet: one alert for each sample (see 6.23).
Shelf-life sampling behind target	Last week (Monday to Sunday), fewer samples of a commodity were kept than its weekly target, or than the lots of it inspected that week if there were fewer: one alert for the week, naming the commodities (see 6.23).
Lot going to a customer outside its spec	A lot recorded in the last 14 days as going to a customer whose spec it doesn't meet, or that couldn't be checked against it: one alert for each record, with the reason it went anyway (see 6.24). It follows the switch in the Customer Specifications settings.

Alert	When it is raised (default limits)
Lot going without a needed certificate	One alert for the site, listing the lots going by tomorrow, or gone in the last 14 days, to customers who need a quality certificate with every lot, that have none (see 6.25). It clears once each lot has its certificate, and follows the switch in the Quality Certificates settings.
Inspector out of line	An inspector whose latest result as an inspector in a calibration check of a commodity was outside a tolerance: one alert for each inspector and commodity, with what they were out on (see 6.26). It clears when they pass a later check; a later failure makes it new again.
Calibration checks overdue	One alert for the site, listing the active inspectors whose calibration check of a commodity is overdue, when the site expects checks (see 6.26).
Objective off track	A quality objective whose year to date, as of the latest month ended with a figure, misses its target (or that missed it, for 30 days after it ended): one alert for each objective, saying whether the owner has explained why (see 6.27). Each month it stays off track makes it new again.
Objective figures not entered in time	One alert for the site, listing the objectives on an own measure whose figure for a month wasn't entered by its due day (see 6.27).
Mock recall overdue	When the site expects a mock recall every so many months, one alert for the site once the next one is overdue, with when it was due and when the latest was (see 6.28).
Mock recall didn't pass	The latest finished mock recall didn't pass and no corrective action was raised from it (for a year): its time, the share accounted for and the customers confirmed (see 6.28). A corrective action, or a later exercise, clears it.

Alert	When it is raised (default limits)
Internal audits overdue	One alert for the site with each checklist on the audit plan whose next audit is overdue, with when it was due and when the latest was (see 6.29). Another checklist becoming overdue makes it new again.
Audit findings overdue	One alert for the site with the audit findings still open past their due date: how many, how many are major, and the oldest, with their owners (see 6.29). Closing or reassigning them clears it.
Certificate expired or expiring	One alert for the site with each program whose certificate has expired, or expires within 60 days (in the settings), with when the next audit is booked (see 6.30). Adding the new certificate clears it.
External audits overdue	One alert for the site with each program whose next audit is overdue: the date it was booked for, or when it was due on the plan and when the latest was (see 6.30). Recording the audit clears it.
External audit non-conformances overdue	One alert for the site with the non-conformances past their due date and not yet sent to the auditor: how many, how many are major or critical, and the oldest, with their owners (see 6.30). Sending the answers, or a later due date when the auditor gives more time, clears it.
Change waiting for a decision	One alert for the site with the changes sent for approval more than 7 days ago (in the settings) and not decided yet, with when each was sent (see 6.31). Another change waiting too long makes it new again; deciding them clears it.
Change actions overdue	One alert for the site with the actions of changes being carried out that are past their due date: how many, how many belong to high-risk changes, and the oldest, with their owners (see 6.31). Marking them done, or a later due date, clears it.
Change not checked	One alert for the site with the changes in effect whose check date has passed without a check (see 6.31). Checking them, or a later check date, clears it.

Alert	When it is raised (default limits)
Inspections rejected by their sampling plan	One alert for the site with the inspections of the last 7 days whose defects were more than their plan accepts, with the lots (see 6.33). Another one makes it new again; it clears when none of the last 7 days is rejected.
Inspections not sampled as their plan asks	One alert for the site with the inspections of the last 7 days with fewer units inspected than the plan asks, or no lot size (see 6.33). Another one makes it new again.
Lots out of their temperature limits	One alert for the site with the lots inspected in the last 7 days with a temperature out of their commodity's limits, with the temperatures (see 6.34). Another one makes it new again.
Storage readings out of range	One alert for the site with the storage readings of the last 7 days out of their place's limits, saying how many don't say what was done yet (see 6.34). Another one makes it new again.
Non-conforming product waiting for a decision	One alert for the site with the non-conforming product records waiting for a decision longer than the site's days (see 6.35). Another one makes it new again.
Non-conforming product decisions not done	One alert for the site with the records decided but not closed in the site's days after the decision (see 6.35). Another one makes it new again.
Risk reviews overdue	One alert for the site with the risks whose review date has passed (see 6.36). Another one makes it new again.
Risks very high with their controls	One alert for the site with the risks scored 20 or more even with their controls (see 6.36). Another one, or a higher score, makes it new again.
Control charts signalling	One alert for the site with the control charts that have a signal in the last 7 days (see 6.37). Another signal makes it new again.

Alert	When it is raised (default limits)
Failed lab tests not dealt with	One alert for the site with the lab tests that failed a market's limits, with no non-conforming product logged from them and nothing said about what was done (see 6.38). Another one makes it new again.
Lab results overdue	One alert for the site with the lab tests still waiting for their results after the days set (see 6.38). Another one makes it new again.
Recall customers not confirming	One alert for the site with the customers of open recalls who were told and haven't confirmed what they hold and did within the days set (2 to start with; see 6.39). Another one makes it new again.
Recalls with something overdue	One alert for the site with the open recalls whose notice to the regulator (in Canada, due the day the recall starts), or whose effectiveness checks, are overdue (see 6.39). Another one makes it new again.
Open positive environmental swabs	One alert for the site with the positives not closed yet, those clear marked to close (see 6.40). A new positive makes it new again.
Environmental swabs missed or late	One alert for the site with the routine swabs missed in the last 14 days, the swabs after a positive overdue and the lab results late (5 days to start with; see 6.40). Another one makes it new again.
Pre-op checks missed or not released	One alert for the site with the pre-op checks of the last 14 days that were missed or never released (see 6.41). Another one makes it new again.
Pre-op items failing again and again	One alert for the site with the checklist items that failed their first check 3 times or more in 14 days (see 6.41). Another item makes it new again.

Alert	When it is raised (default limits)
Cleaning missed or not verified in time	One alert for the site with the cleaning missed in the last 14 days and the cleaning done but not verified in time (2 days to start with; see 6.41). Another one makes it new again.
Wrong labels found	One alert for the site with the wrong labels found in the last 14 days, today's too, and how many aren't corrected yet (see 6.42). Another one makes it new again.
Label checks missed or late	One alert for the site with the start-up label checks missed and the label checks late in the last 14 days (see 6.42). Another one makes it new again.
Wash water out of range	One alert for the site with the wash water readings out of range in the last 14 days, today's too, and how many aren't corrected yet (see 6.43). Another one makes it new again.
Wash water checks missed or late	One alert for the site with the start-up wash water checks missed and the checks late in the last 14 days (see 6.43). Another one makes it new again.
Water changes overdue	One alert for the site with the wash points whose water change is overdue, each with the day it was due and its last change (see 6.43). Another one makes it new again.
Loads rejected or released with problems	One alert for the site with the loads rejected or released with problems in the last 14 days, today's too, and how many were rejected (see 6.44). Another one makes it new again.
Loads left open	One alert for the site with the loads still open after the hours set in the Settings (12 to start with; see 6.44). Another one makes it new again.
Supplier documents expired, expiring or missing	One alert for the site with the documents their category needs that are expired, expiring within 30 days (to start with) or missing at the suppliers approved, with or without conditions (see 6.45). Another one, or one expiring that has since expired, makes it new again.

Alert	When it is raised (default limits)
Supplier reviews overdue	One alert for the site with the suppliers approved, with or without conditions, whose review date has passed (see 6.45). Another one makes it new again.
Metal detector checks failed	One alert for the site with the metal detector checks failed in the last 14 days, today's too, and how many aren't fixed yet, those failed before them too until fixed or closed (see 6.46). Another one makes it new again.
Metal detector checks missed or late	One alert for the site with the start-up metal detector checks missed and the checks late in the last 14 days (see 6.46). Another one makes it new again.
Net weight checks failed	One alert for the site with the net weight checks failed in the last 14 days, today's too, how many aren't dealt with yet (those failed before them too, until dealt with), and why each failed (see 6.47). Another one makes it new again.
Glass and brittle plastics area checks overdue	One alert for the site with the areas whose check is overdue, and when each was due (see 6.48). Another area overdue makes it new again.
Glass or brittle plastic breakages not cleared	One alert for the site with the breakages not cleared yet: what broke, where, when, and whether it is open or cleaned up and waiting to be cleared (see 6.48). Another breakage makes it new again.
Water tests overdue	One alert for the site with the water tests whose sample is overdue (the retests of a failed result and the tests never sampled too), each with its source and when it was due (see 6.49). Another test overdue makes it new again.
Failed water tests not closed	One alert for the site with the failed water test results not closed yet: the source, the test, the result and when it was sampled (see 6.49). Another failed result makes it new again.

Alert	When it is raised (default limits)
Work waiting for its hygiene clearance	One alert for the site with the work orders in a food-contact area still waiting for their hygiene clearance longer than the settings' hours after the work, each with where it was and when the work was done (see 6.50). Another work order late makes it new again.
Temporary repairs past their date	One alert for the site with the temporary repairs not made permanent by their date, each with its work order and where (see 6.50). Another one past its date makes it new again.
Planned maintenance overdue	One alert for the site with the planned maintenance tasks overdue, each with when it was due (see 6.50). Another task overdue makes it new again.
Visitors not signed out from an earlier day	One alert for the site with the visitors and contractors still signed in from a day before today, each with their company and when they signed in (see 6.51). Another one makes it new again.
Workers overdue for training	One alert for the site with the workers overdue for training (a refresher past due, or not trained past their time), each with their employee number and the courses (see 6.52). Another worker or course overdue makes it new again.
Fields needing their pre-harvest assessment	One alert for the site with the fields harvesting without a valid assessment, those whose harvest starts within the Settings' days without one, and those whose approval ends within those days while their season goes on, each with why (see 6.53). A field newly listed, or listed for another reason, makes it new again.
Security checks missed	One alert for the site with the security checks missed in the last 14 days, each with its day (or its week) (see 6.54). Another check missed makes it new again.

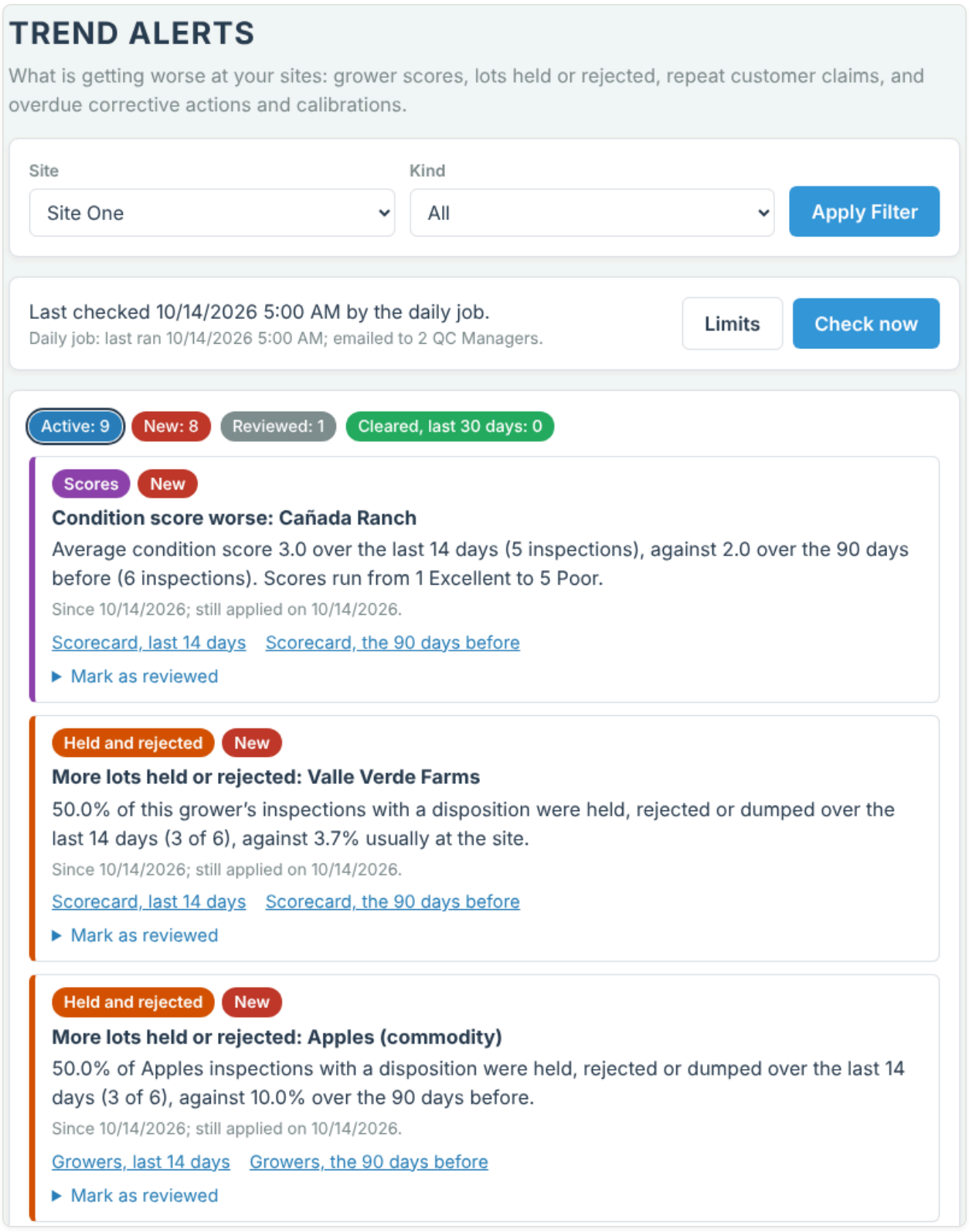
Alert	When it is raised (default limits)
Food defense incidents open	One alert for the site with the incidents still open, each with its number, kind and day, and whether product was possibly affected and, then, whether the regulator isn't recorded as told (see 6.54). Another incident open makes it new again.
Vulnerability assessment review overdue	One alert for the site when the vulnerability assessment wasn't reviewed by its date, with the last review, or was never reviewed with points assessed (see 6.54).
No mock recall in the last 12 months	No mock recall started in the last 12 months has been finished, at a site in Canada (a recall simulation is required at least once every 12 months) or at a site that expects them on a schedule, unless Mock recall overdue already says so: when the latest was (see 6.28). A finished exercise clears it.
Organic certification surrendered, suspended or revoked	A facility of the site in Buyer Compliance whose latest reading from USDA Organic INTEGRITY found the operation no longer certified (Surrendered, Suspended or Revoked): one alert for each facility, with the Operation ID, the status and its date, the day it was read and, while the certificate kept in Grower Certificates or External Audits hasn't run out, that it still shows as current there (see 6.64). Another status makes it new again; a reading that finds the operation certified again clears it.
TraceGains documents not sent	One alert for the site with its TraceGains documents that could not be sent (one cut off while sending says to check in TraceGains whether it arrived), and those to send, approved or going by themselves, still waiting two hours later, saying when TraceGains refused the token (see 6.64). Another document makes it new again; it clears when none is left.
Facility certificates run out or running out	One alert for the site with its facilities in Buyer Compliance whose latest certificate has run out, or runs out within 30 days, with no newer one kept yet (a facility no longer certified is in the alert above instead) (see 6.64). A facility newly in it, or one that has run out since, makes it new again; a newer certificate, read or added by hand, clears it.

Alert	When it is raised (default limits)
Facility certificates not read	One alert for the site with its facilities in Buyer Compliance whose certificate could not be read three times running, each with why (the API key refused or none saved, a number the system doesn't know, the system not reached, or an answer that couldn't be used) and since when; a good reading starts the count again (see 6.64). Another facility makes it new again.
TraceGains token running out or run out	One alert for each site linked to a TraceGains location, from 30 days before the Gather API token runs out (TraceGains token runs out on ...) and once it has (TraceGains token ran out on ...), saying that a system administrator asks TraceGains API Support (APISupport@tracegains.com) to extend it and then enters the new date (see 6.64). Running out makes it new again; a later date clears it.
CanadaGAP forms overdue	One alert for each CanadaGAP form overdue at a site that follows CanadaGAP: an ongoing form without a record within its days, or a corrective action past due without the action taken (see 6.75). It clears once the form is done.
CanadaGAP certificate expiring	The site's CanadaGAP certificate expires within 30 days, or has expired (see 6.75).
Agronomic inputs waiting for verification	Agronomic input applications (Forms H1, H2) recorded more than 7 days ago and still waiting for verification (see 6.77).
Harvests before the EAHD	Harvests recorded in the last 30 days before their production site's earliest acceptable harvest date, with a reason (see 6.61 and 6.77).
Mexico: SENASICA Programme	One alert for each requirement of the SENASICA Programme that is overdue at a site that follows Mexico, or a certificate, audit or finding that is due (see 6.82); and the harvest crews, hot-water runs and applications that need attention (see 6.83, 6.84 and 6.77). It clears once the record is up to date, and while the Mexico module is off.

Quality Control Managers can change these limits for each site (see Limits, below). Certificate, sign-off and training alerts follow their own settings instead (see 6.15, 6.16 and 6.18), and the buyer compliance alerts are always on: they have no limits. The CanadaGAP alerts follow the site's CanadaGAP settings instead (see 6.75), and clear while CanadaGAP is off at the site; the Mexico alerts follow the SENASICA Programme's settings (see 6.82), and clear while Mexico is off at the site.

READING THE ALERTS

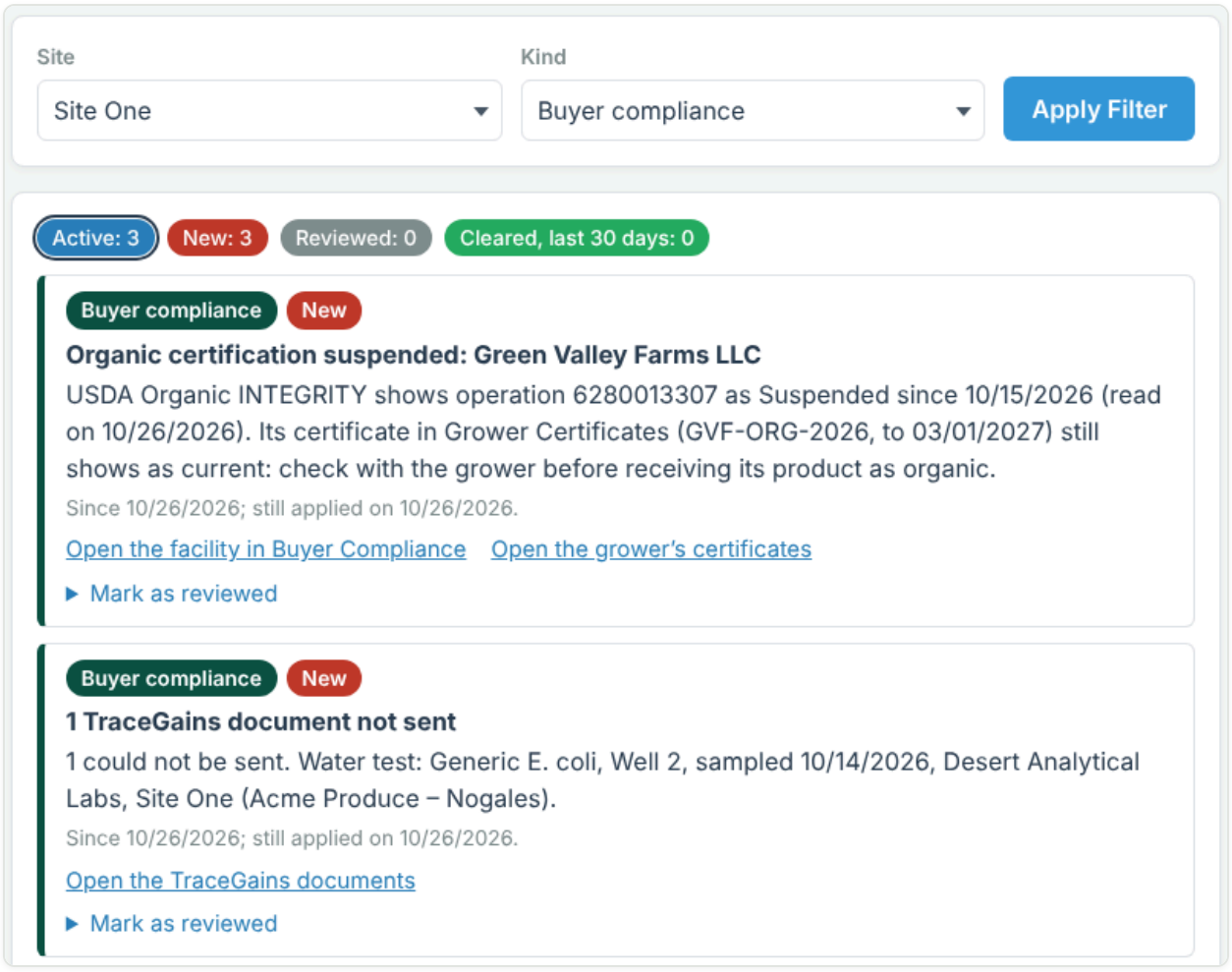
1. Go to Overview > Trend Alerts.
2. Quality Control Managers with more than one site choose the Site, or All my sites. Choose a Kind to see only scores, held and rejected lots, claims, overdue items, certificates, training, grower approval, documents, shelf life, customer specs, quality certificates, inspector calibration, quality objectives, mock recalls, internal audits, external audits, change control, sampling plans, cold chain, non-conforming product, risk register, control charts, lab results, recalls, environmental monitoring, sanitation, label checks, wash water, load inspections, approved suppliers, metal detection, net weight checks, glass and brittle plastics, water testing, maintenance, visitors and contractors, employee training, field audits, food defense or buyer compliance, then select Apply Filter.
3. Select one of the counts to see the Active alerts (new and reviewed), only the New or Reviewed ones, or those Cleared in the last 30 days.



Trend Alerts for a site

Each alert says what changed, with the figures, and since when it applies. Its links open what is behind it: the grower's scorecard for the recent period and the period

before (6.11), the claims, the corrective action, the instrument, or the facility, the TraceGains documents and the TraceGains tab in Buyer Compliance. With a site chosen, the page also shows when the site was last checked and what the daily email last did.



The buyer compliance alerts at a site

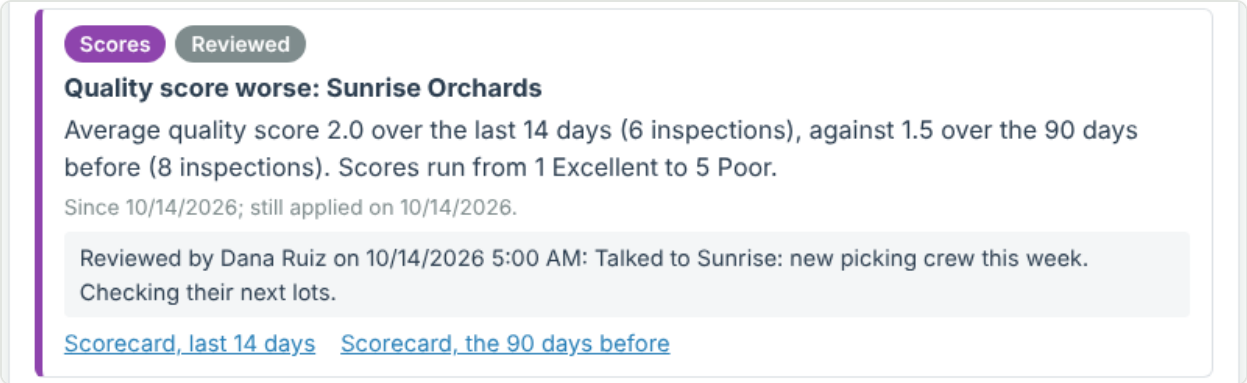
Note: Everyone with the page sees the score alerts. The other alerts show only to those who can open the page behind them: held and rejected lots need Lot Disposition, claims need Customer Claims, overdue corrective actions need Corrective Actions, overdue calibrations need Calibration Records, certificate alerts need Grower Certificates, sign-off alerts need Inspection Sign-off, training alerts need Inspector Training, overdue grower action requests need Grower Action Requests, management review alerts need Management Review, grower approval alerts need Approved Growers, shelf-life alerts need Shelf Life, customer-spec alerts need Customer Specifications, quality-certificate alerts need Quality Certificates, inspector-calibration alerts need Inspector Calibration, objective alerts need Quality Objectives, mock recall alerts need Mock Recalls, internal audit alerts need Internal Audits, external audit alerts need External Audits, change control alerts need Change Control, sampling plan alerts need Sampling Plans, cold chain alerts need Cold Chain, non-conforming product alerts need Non-Conforming Product, risk register alerts need Risk Register, control chart alerts need Control Charts, lab result alerts need Lab Results, recall alerts need Recalls, environmental monitoring alerts need Environmental Monitoring, sanitation alerts need Sanitation, label check alerts need Label Checks, wash water alerts need Wash Water, load inspection alerts need Load Inspections, approved supplier alerts need Approved Suppliers, metal detection alerts need Metal Detection, net weight check alerts need Net Weight Checks, glass and brittle plastics alerts need Glass and Brittle Plastics, water testing alerts need Water Testing, maintenance alerts need Maintenance, visitor alerts need Visitors and Contractors, employee training alerts need Employee Training, field audit alerts need Field Audits, and food defense alerts need Food Defense. Document alerts show only to Quality Control Managers, since they name people, and buyer compliance alerts only to Quality Control Managers and system administrators, who have Buyer Compliance (see 6.64).

REVIEWING AN ALERT

An alert stays New until a Quality Control Manager looks into it. Select Mark as reviewed under the alert, write what was done or found if you like, and select Mark as reviewed. The alert then shows who reviewed it, when, and the note.



Marking an alert as reviewed



A reviewed alert with its note

You don't close alerts yourself. An alert is Cleared at the next check once it no longer applies, for example when the grower's scores recover or the corrective action is closed. If it applies again within a week, the same alert comes back, still reviewed, instead of a new one.

WHEN ALERTS ARE CHECKED AND EMAILED

- Every morning a scheduled job checks each site and emails its new alerts to the site's Quality Control Managers, in their language, through the site's email settings (3.2). Each alert is emailed once, and nothing is sent when there is nothing new.
- When someone opens Trend Alerts and the site hasn't been checked yet that day, it is checked then.
- Quality Control Managers can select Check now to check the site straight away, for example after closing a corrective action.

> **Tip:** If the page says the daily job has not run, or that line is red, alerts still show on the page but no emails go out. Ask your system administrator to check the scheduled job.

LIMITS

Quality Control Managers decide when alerts are raised at each site: choose the site, then select Limits. Turn each kind of alert on or off; change how much worse a score must be, how many points above usual, the periods compared, the fewest inspections, and the number of claims and days; and turn the daily email on or off. Each field shows the values allowed and the default. Select Save limits: the site is checked again straight away with the new limits.

TREND ALERTS

← Back to the alerts

Alert limits: Site One

When to raise an alert at this site. Changes apply from the next check; saving checks the site again.

Grower scores getting worse

Alert on scores

When a grower's average quality or condition score over the recent period is worse than over the period before by at least this much. Scores run from 1 Excellent to 5 Poor.

Worse by at least

0.5

0.1 to 4; default 0.5.

More lots held or rejected

Alert on held and rejected lots

When the share of a grower's inspections held, rejected or dumped over the recent period is this many points above the site's usual share, or a commodity's is that far above its own usual share. Needs Lot Disposition.

Percentage points above usual

10

1 to 100; default 10.

Periods compared (scores and held lots)

The recent period ends today. Growers and commodities with fewer inspections than this in either period are not compared.

Recent period (days)	Compared with the days before	Fewest inspections
14	90	5
7 to 60; default 14.	30 to 365; default 90.	In each period. 1 to 500; default 5.

Repeat customer claims

Alert on repeat claims

When this many claims about one grower's lots, or from one customer, were received within so many days. Rejected and withdrawn claims don't count.

Claims	Received within (days)
3	30
2 to 50; default 3.	7 to 180; default 30.

Alert limits for a site

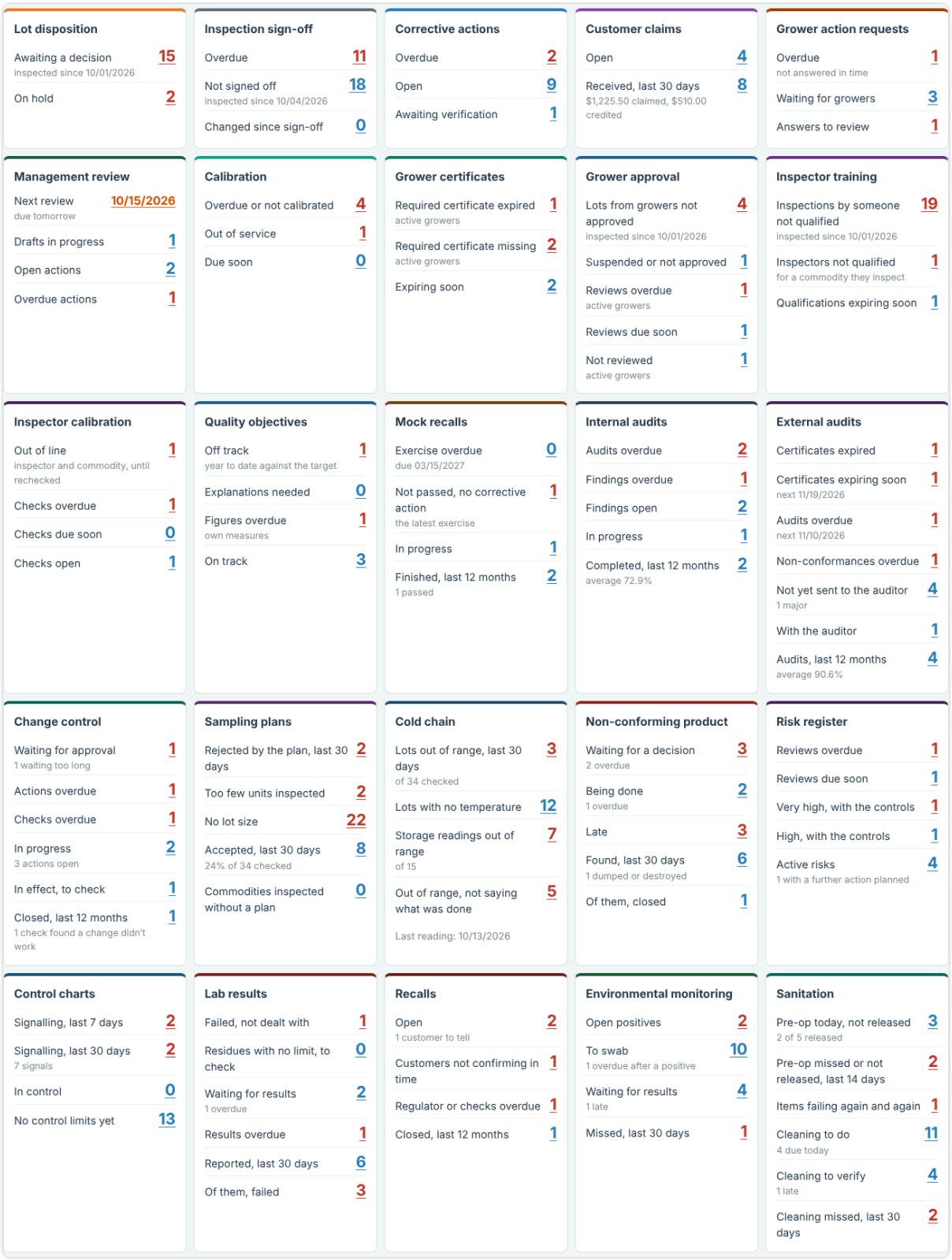
> **Note:** Give Users the Trend Alerts permission on gear > Users > Add / Change User Permissions; they see it after they next sign in. Quality Control Managers have it already. Only Quality Control Managers mark alerts reviewed, change the limits and check now.

6.14 QA Dashboard

Overview > QA Dashboard shows one site's quality picture on one page: what needs attention now, and how the last 13 weeks went. It only reads what is already recorded; it changes nothing.

NEEDS ATTENTION

1. Go to Overview > QA Dashboard.
2. With more than one site, choose the Site: one site, or All my sites, a site group, Choose sites... or one of your views to see them added up (see Several Sites at Once, below). The page starts on All my sites, unless a choice is already kept from Today or a list; the choice is shared with Today and the lists (see 6.68).
3. Select a count to open the list behind it, with the same dates and filters, for example the corrective actions that are overdue.
4. When something is still to set up for the quality assurance features at the site, Quality Control Managers see a line above the tiles with how many items, and Open QA Setup (see 6.32).



QA Dashboard: what needs attention

Label checks

Start-up checks to do today 2 of 3 lines checked	1
Lines with a check late now	1
Wrong labels to correct 1 found today	1
Wrong labels found, last 30 days	3
Start-up checks missed, last 14 days	1
Checks late, last 14 days	1

Wash water

Start-up checks to do today 3 of 4 wash points checked	1
Wash points with a check late now	1
Out of range, to correct 1 found today	1
Readings out of range, last 30 days	3
Water changes overdue	1
Start-up checks missed, last 14 days	1
Checks late, last 14 days	1

Metal detection

Start-up checks to do today 2 of 3 detectors checked	1
Detectors with a check late now	1
Failed, to fix 1 failed today	1
Failed checks, last 30 days	3
Foreign material found, last 30 days 1 today	3
Start-up checks missed, last 14 days	1
Checks late, last 14 days	1

Net weight checks

Checks today 1 failed	2
Failed, to deal with	2
Failed, last 30 days	7
Checks, last 30 days average give-away 1.2%	42

Glass and brittle plastics

Area checks due today 0 of 5 areas checked today	1
Area checks overdue	2
Items damaged or missing	2
Breakages not cleared 1 cleaned up, to clear	2
Breakages, last 30 days	3

Water testing

Tests overdue 1 to sample again after a failed result	2
Tests due soon	1
Failed results not closed	1
Water sources not used now	1
Waiting for the lab	1
Samples, last 90 days 2 failed	5

Maintenance

Open work orders 1 urgent	2
Waiting for the hygiene clearance 1 longer than 4 hours	1
Temporary repairs to make permanent 1 past its date	2
Planned maintenance overdue	1
Planned maintenance due within 7 days	1
Work orders requested, last 30 days	7

Visitors and contractors

In the building now	3
Visits today 1 entering production	3
Not signed out from an earlier day	1
Not allowed into production, last 30 days	1

Employee training

Workers overdue 72% of the required training in date	6
Still to train, in time the first by 10/19/2026	2
Refresher due within 30 days	6
Sessions, last 30 days 6 people trained	3

Load inspections

Loads inspected today 1 released, 0 rejected	2
Open loads 1 late	2
Open too long	1
Rejected or released with problems, last 30 days	2
Loads with a pulp temperature out of range, last 30 days	1

Approved suppliers

Suppliers approved 1 with conditions	4
Waiting for approval	1
Documents expired or missing 1 expiring soon	1
Reviews overdue	1
Suppliers suspended	1

Field audits

Fields approved for harvest 1 with conditions	3
Harvesting without a valid assessment	2
Harvest within 14 days, not assessed for it	1
Approvals ending in season	1
Fields not approved 2 approvals expired	1
Assessments, last 30 days	2

Food defense

Security check still to do today	1
Security checks missed, last 14 days	2
Checks with something not OK, last 30 days	2
Incidents open 1 with product possibly affected	2
Incidents, last 30 days	3
Vulnerability assessment review overdue due 09/30/2026	1
Assessed points scoring high or very high	2

Controlled documents

Not read in time confirmations missing, 1 person	1
Reviews overdue	1
Reviews due soon	1
New versions coming	1

Shelf life

Checks overdue samples	1
To check today with the overdue ones	2
Failed last 30 days	1
In progress	6
Commodities behind their weekly target last week	2

Customer specs

Sent outside the spec last 30 days and ahead, of 5 lots sent	1
Lots meeting no customer's spec last 7 days, of 19 checked	10
Specs in force 4 customers	4

Quality certificates

Going without a certificate customers who need one, by tomorrow	1
Issued, last 30 days	3
Email failed the last try, last 30 days	1

Trend alerts

New	27
Active (new and reviewed)	28

QA Dashboard: what needs attention (continued)

Tile	What it counts
Lot disposition	Inspections of the last 14 days still awaiting a decision, and lots on hold now (see 6.7). If lot disposition is off for the site, the tile says so.
Inspection sign-off	Inspections overdue for sign-off, not signed off (in the last 13 weeks, since sign-off started), and changed since their sign-off (see 6.16). If sign-off is off for the site, the tile says so.
Corrective actions	Overdue, open, and awaiting verification (see 6.9).
Customer claims	Open claims, and the claims received in the last 30 days with the amounts claimed and credited (see 6.10).
Grower action requests	Requests overdue (not answered by their due date), waiting for growers, and answers to review (see 6.19).
Management review	When the next review is due (orange when it is due soon, red when overdue), the drafts in progress, and the open and overdue review actions (see 6.20).
Calibration	Instruments overdue or not calibrated yet, out of service, and due soon (see 6.12).
Grower certificates	Active growers with a required certificate expired or missing, and certificates expiring soon (see 6.15). If no certificate types are required at the site, the tile says so.
Grower approval	Lots of the last 14 days from growers suspended or not approved on the inspection date, the growers suspended or not approved, approval reviews overdue and due soon, and active growers not reviewed (see 6.21).
Inspector training	Inspections of the last 14 days by someone not qualified for the commodity (when the site checks inspector training), active inspectors not qualified for a commodity they inspect, and qualifications expiring soon (see 6.18). If the check is off, the tile says so.

Tile	What it counts
Inspector calibration	Inspectors out of line for a commodity (until they pass a later check), calibration checks overdue and due soon when the site expects checks, and the checks open (see 6.26).
Quality objectives	Objectives off track (their year to date against the target), those whose owner hasn't explained why yet, own figures not entered in time, and the objectives on track (see 6.27).
Mock recalls	An exercise overdue, when the site expects them; the latest one not passed without a corrective action; the exercises in progress; and those finished in the last 12 months, with how many passed (see 6.28).
Internal audits	Audits overdue on the plan (or when the next one is due); audit findings past their due date; the findings open, with how many are major; the audits in progress; and those completed in the last 12 months, with their average score (see 6.29).
External audits	Certificates expired, and those expiring soon (with when the next one expires); audits overdue (or when the next one is due); non-conformances past their due date; those not yet sent to the auditor, with how many are major or critical, and those with the auditor; and the audits of the last 12 months, with their average score (see 6.30).
Change control	Changes waiting for approval; actions of changes past their due date; checks overdue (or when the next one is due); the changes in progress, with their actions open; those in effect, to check; and those closed in the last 12 months, with how many checks found a change didn't work (see 6.31).
Sampling plans	The inspections of the last 30 days rejected by their plan, with too few units inspected and with no lot size; those accepted, with their share of the inspections checked; and the commodities inspected without a plan (see 6.33).

Tile	What it counts
Cold chain	The lots of the last 30 days out of their temperature limits (of those checked) and those with no temperature recorded; the storage readings out of range (of all the readings) and those not saying what was done; and the date of the last reading (see 6.34).
Non-conforming product	The records waiting for a decision and being done, with those overdue; all those late; and the records found in the last 30 days, with how many were dumped or destroyed and how many are closed (see 6.35).
Risk register	The risks whose review is overdue and due soon; those very high and high with their controls; and the active risks, with how many have a further action planned (see 6.36).
Control charts	The charts with a signal in the last 7 days, and in the last 30 days with how many signals; those in control; and those with points but no control limits yet (see 6.37).
Lab results	The failed tests not dealt with; the tests waiting for results, with those overdue; and the tests reported in the last 30 days, with how many failed (see 6.38).
Recalls	The open recalls, with the customers still to tell; the customers told and not confirming in time; the recalls with the regulator's notice or the checks overdue; and the recalls closed in the last 12 months (see 6.39).
Environmental monitoring	The open positives; the swabs to take, with those overdue after a positive; the swabs waiting for the lab's results, with those late; and the routine swabs missed in the last 30 days (see 6.40).
Sanitation	The pre-op checks of today not released, with how many were; those missed or not released in the last 14 days; the checklist items failing again and again; the cleaning to do, with what is due today; the cleaning to verify, with those late; and the cleaning missed in the last 30 days (see 6.41).

Tile	What it counts
Label checks	The start-up label checks to do today, with how many lines were checked; the lines with a check late now; the wrong labels to correct, with those found today; the wrong labels found in the last 30 days; and the start-up checks missed and the checks late in the last 14 days (see 6.42).
Wash water	The start-up checks to do today, with how many wash points were checked; the wash points with a check late now; the readings out of range to correct, with those found today; the readings out of range in the last 30 days; the water changes overdue; and the start-up checks missed and the checks late in the last 14 days (see 6.43).
Metal detection	The start-up checks to do today, with how many detectors were checked; the detectors with a check late now; the failed checks to fix, with those failed today; the failed checks in the last 30 days (opening Records with the failed ones only); the foreign material found in the last 30 days, with that found today; and the start-up checks missed and the checks late in the last 14 days (see 6.46).
Net weight checks	The checks today, with those failed; the failed checks to deal with; the checks failed in the last 30 days; and the checks in the last 30 days, with the average give-away (see 6.47).
Glass and brittle plastics	The area checks due today, with how many areas were checked today; the area checks overdue; the items damaged or missing; the breakages not cleared, with those cleaned up and waiting to be cleared; and the breakages in the last 30 days (see 6.48).
Water testing	The tests overdue, with those to sample again after a failed result; the tests due soon; the failed results not closed; the water sources not used now; the samples waiting for the lab, with those late; and the samples in the last 90 days, with those failed (see 6.49).

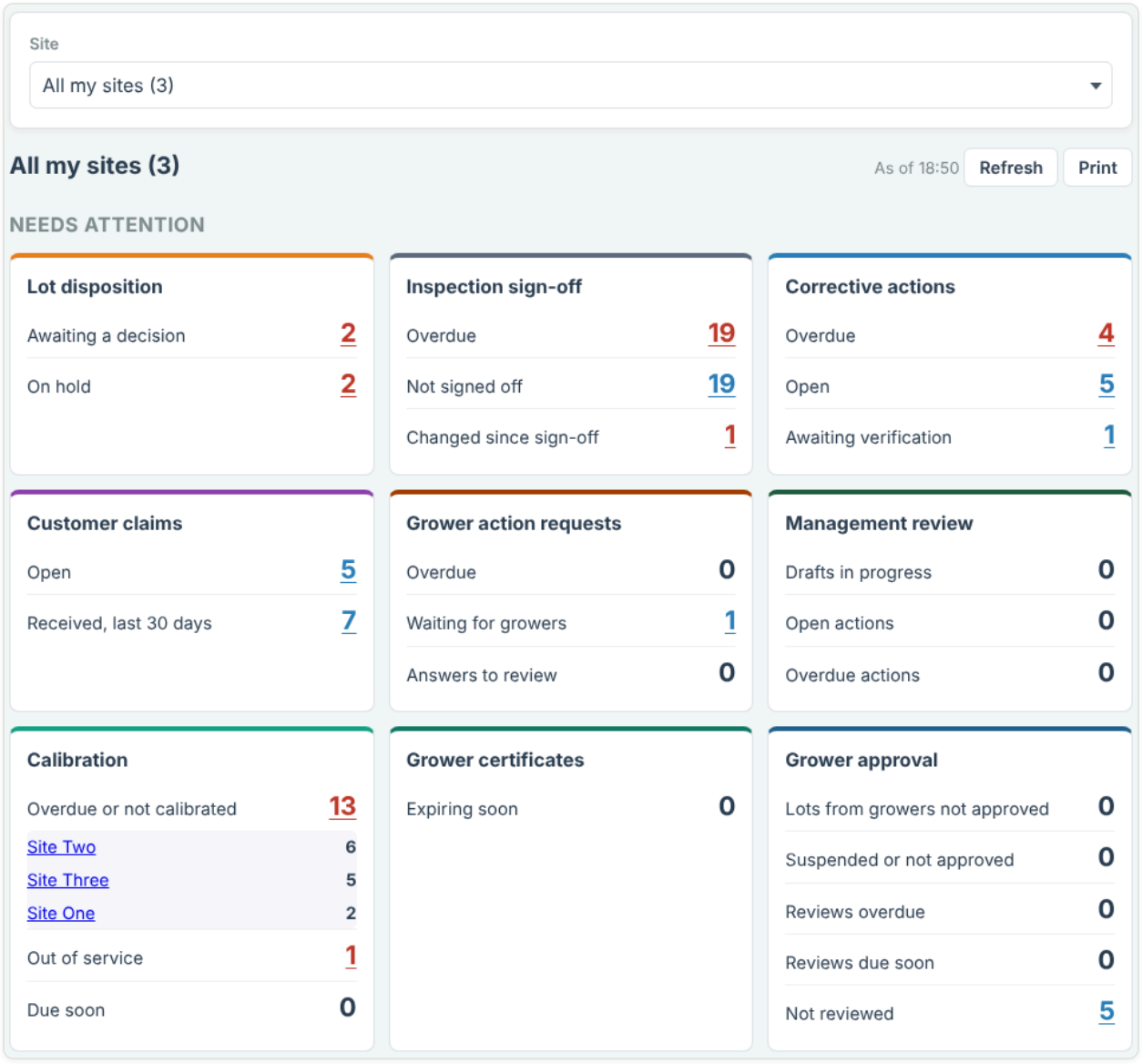
Tile	What it counts
Maintenance	The open work orders, with the urgent; those waiting for the hygiene clearance, with those waiting longer than the settings' hours; the temporary repairs to make permanent, with those past their date; the planned maintenance overdue; the planned maintenance due within the settings' days, with that due today; and the work orders requested in the last 30 days (see 6.50).
Visitors and contractors	Those in the building now; the visits today, with those entering production; those not signed out from an earlier day; and those not allowed into production in the last 30 days (see 6.51).
Employee training	The workers overdue, with the share of the required training in date; those still to train in time, with the first by when; those with a refresher due within the Settings' days; and the sessions of the last 30 days, with the people trained (see 6.52).
Load inspections	The loads inspected today, with how many were released and rejected; the open loads, with those late; the loads open too long; the loads rejected or released with problems in the last 30 days; and the loads with a pulp temperature out of range in the last 30 days (see 6.44).
Approved suppliers	The suppliers approved, with how many with conditions; those waiting for approval; the documents their category needs expired or missing at suppliers approved, with how many expire soon; the reviews overdue; and the suppliers suspended (see 6.45).
Field audits	The fields approved for harvest today, with how many with conditions; those harvesting without a valid assessment; those whose harvest starts within the Settings' days, not assessed for it; the approvals ending while the season goes on; the fields not approved, with how many approvals expired; and the assessments of the last 30 days (see 6.53).

Tile	What it counts
Food defense	The security check still to do today (or this week), or done; the checks missed in the last 14 days; the checks with something not OK in the last 30 days; the incidents open, with how many with product possibly affected; the incidents of the last 30 days; whether the vulnerability assessment's review is overdue, or when the next is due; and the assessed points scoring high or very high (see 6.54).
Controlled documents	For Quality Control Managers: read confirmations not made in time (and how many people), document reviews overdue and due soon, and new versions about to take effect. For Users: the documents they have to read, and how many are past their date (see 6.22).
Shelf life	Samples with a check overdue, samples to check today (with the overdue ones), samples that failed in the last 30 days (and how many have no corrective action yet), samples in progress, and, when weekly targets are set, the commodities behind their target last week (see 6.23).
Customer specs	Lots sent to a customer outside the customer's spec (from 30 days back and ahead, of the lots recorded as going to customers), lots of the last 7 days that meet no customer's spec (of those checked), and the specs in force today, with how many customers (see 6.24).
Quality certificates	Lots going by tomorrow, or gone in the last 14 days, to customers who need a certificate, that have none; the certificates issued in the last 30 days; and those whose last email failed (see 6.25).
Trend alerts	New alerts, and all active ones (new and reviewed) (see 6.13).

Counts that need action, such as overdue corrective actions or instruments out of service, are red when they are above zero.

SEVERAL SITES AT ONCE

With All my sites, a site group, sites chosen or a view, the heading names them (All my sites (3)) and each tile adds up the sites' counts; a count is red when something is late or wrong at one of them at least. Select a total to see the sites behind it, the largest first, each with its count and a link to the page at that site; select it again to close the list. The 13-week charts are for one site: choose it under Site.



All my sites added up, one total opened by site

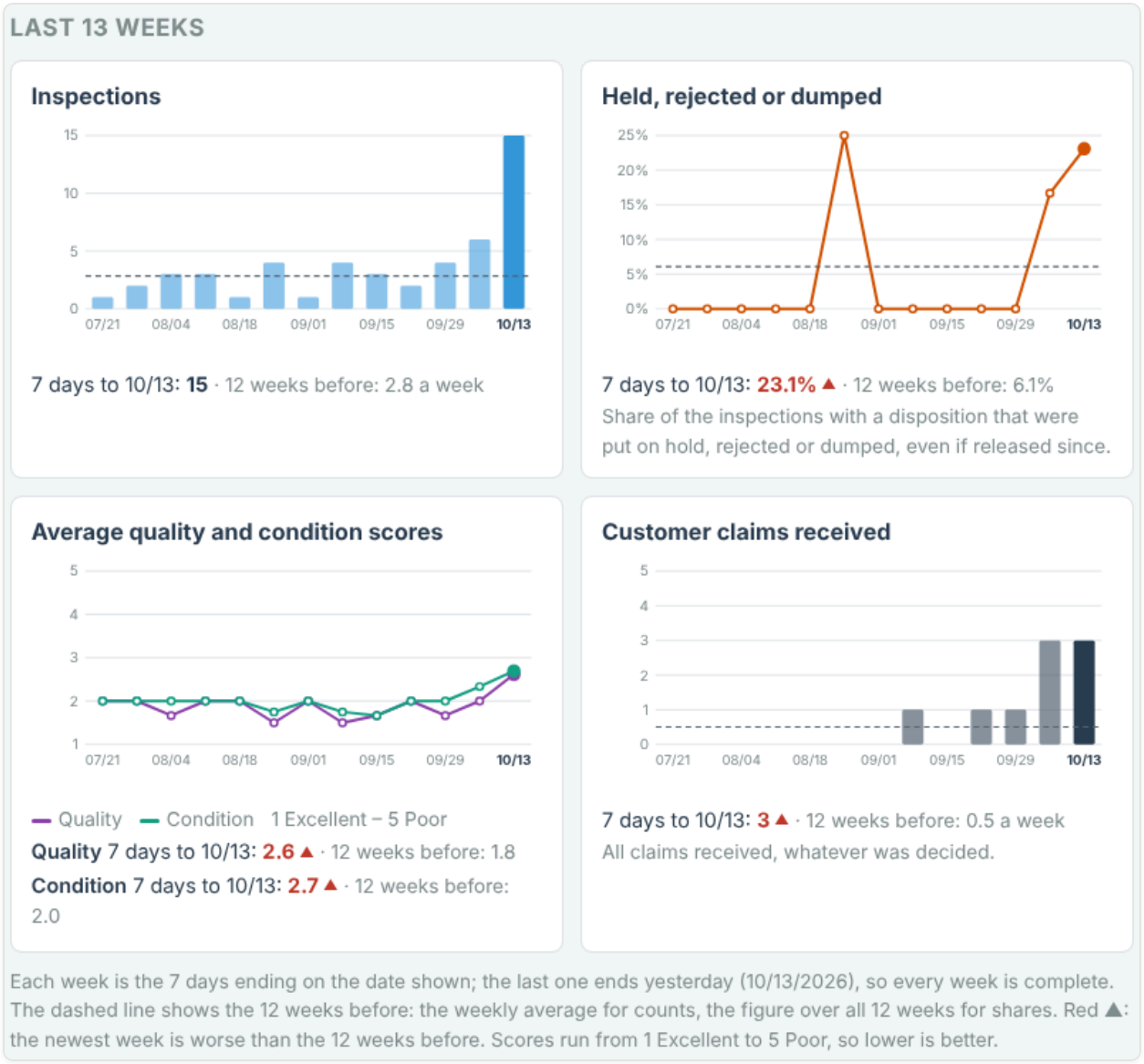
For Quality Control Managers and system administrators, the tiles of all the sites come from counts the server keeps for every site every 15 minutes, so the page

opens at once: As of says when the oldest were counted, and Refresh counts every site again now (refreshing 2 of 3 sites…). A site not counted yet is filled in on its own (loading 2 of 3 sites…). One site’s dashboard is always counted as it is now.

> **Note:** A site whose tiles couldn’t be read is named above the tiles: Some sites could not be loaded: … Reload the page to try again.

THE LAST 13 WEEKS

Below the tiles, charts show the site week by week: inspections, the share of inspections put on hold, rejected or dumped, the average quality and condition scores, and the customer claims received. Each week is the 7 days ending on the date shown; the last one ends yesterday, so every week is complete.



The last 13 weeks

- Under each chart, the newest week is compared with the 12 weeks before it, which the dashed line shows. A figure in red with a ▲ is worse than before.
- Scores run from 1 Excellent to 5 Poor, so a line going up means worse.
- A lot counts as held, rejected or dumped even if it was released later, so recent weeks compare fairly with older ones. The share is of the inspections that have a disposition (see 6.7).
- Claims are counted in the week they were received, whatever was decided.
- Select Figures by week to see the numbers behind the charts.

Tip: Select Print for a clean copy without the menu, for example for a weekly quality meeting. Select Audit pack, next to it, for a PDF of the site's records for an auditor (see 6.17).

Note: Everyone with the page sees inspections and scores. The other tiles and charts show only to those who can open the page behind them: Lot Disposition, Inspection Sign-off, Corrective Actions, Customer Claims, Grower Action Requests, Management Review, Calibration Records, Grower Certificates, Approved Growers, Inspector Training, Inspector Calibration, Quality Objectives, Mock Recalls, Internal Audits, External Audits, Change Control, Sampling Plans, Cold Chain, Non-Conforming Product, Risk Register, Control Charts, Lab Results, Recalls, Environmental Monitoring, Sanitation, Label Checks, Wash Water, Metal Detection, Net Weight Checks, Glass and Brittle Plastics, Water Testing, Maintenance, Visitors and Contractors, Employee Training, Load Inspections, Approved Suppliers, Field Audits, Food Defense, Controlled Documents, Shelf Life, Customer Specifications, Quality Certificates or Trend Alerts. Give Users the QA Dashboard permission on gear > Users > Add / Change User Permissions; they see it after they next sign in. Quality Control Managers have it already.

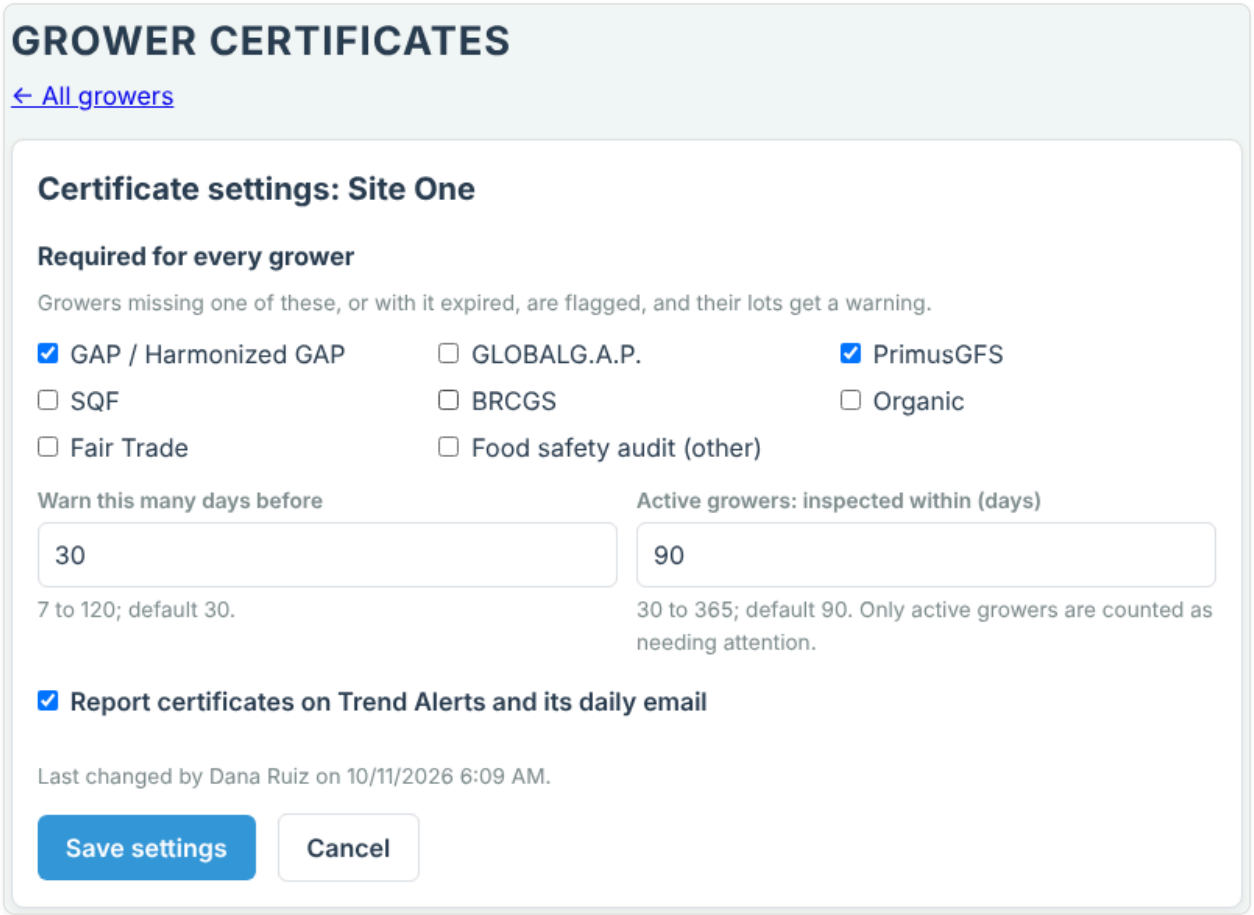
6.15 Grower Certificates

Growers > Grower Certificates keeps each grower's certifications at a site — USDA GAP / Harmonized GAP, GLOBALG.A.P., PrimusGFS, CanadaGAP, SQF, BRCGS, FSSC 22000, organic, fair trade and other audits — with the certificate number, the certification body, the scope, the dates it is valid and copies of the certificate. Quality Control Managers choose the certificates every grower of the site must hold. The page then shows which growers are missing one, or have one expired or about to expire; their lots get a warning, Trend Alerts reports them, and the QA Dashboard counts them.

CHOOSING THE REQUIRED CERTIFICATES

No grower is flagged until a Quality Control Manager chooses the required certificates for the site:

1. Go to Growers > Grower Certificates. Quality Control Managers with more than one site choose the Site and select Apply Filter.
2. Select Settings.
3. Under Required for every grower, tick the certificates each grower of the site must hold, for example CanadaGAP at a Canadian site, or USDA GAP / Harmonized GAP and PrimusGFS at a US one.
4. If you like, change Warn this many days before (7 to 120; 30 by default) and Active growers: inspected within (days) (30 to 365; 90 by default), and turn Report certificates on Trend Alerts and its daily email on or off.
5. Select Save settings. Trend Alerts checks the site again straight away.

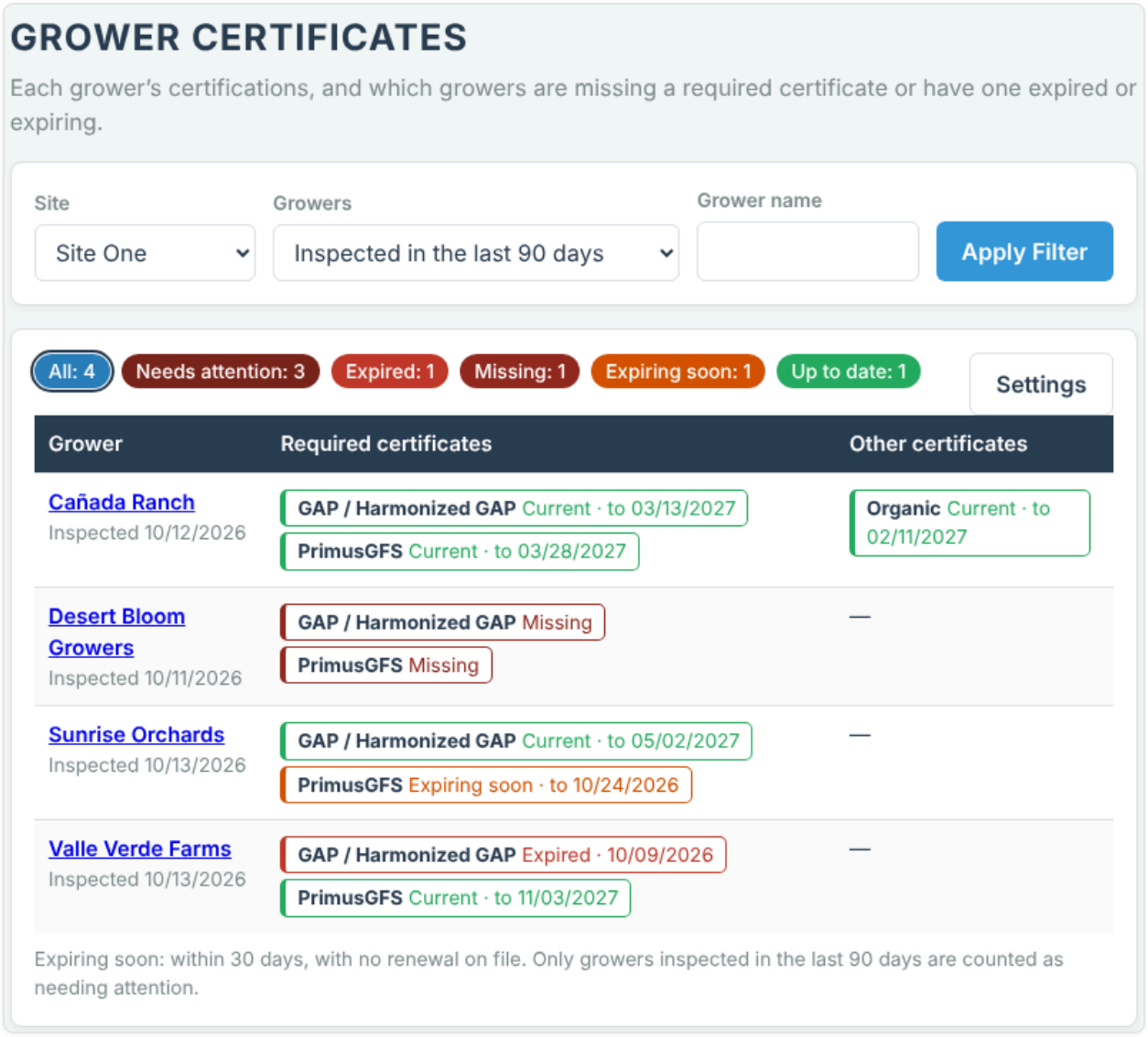


Certificate settings for a site

> **Note:** Only active growers, those inspected at the site within the active period, are counted as needing attention, so growers you no longer receive from don't fill the list. Each change to the settings is kept in History, with who made it.

SEEING WHO NEEDS ATTENTION

Growers > Grower Certificates lists the growers inspected at the site in the active period, with each required certificate and any others on file. Choose All growers under Growers to see every grower, or type part of a Grower name, and select Apply Filter. Select one of the colored counts to see only the growers that need attention, or only those with a certificate expired, missing or expiring soon.



Grower Certificates for a site

Shown as	What it means
Current	Valid today and not running out within the warning period (30 days by default), counting a renewal already on file.
Expiring soon	Runs out within the warning period, and no renewal is on file.
Expired	Has run out, and no newer certificate of that type covers today.
Not valid yet	The certificate on file starts later, so today isn't covered. It is counted with Expired.

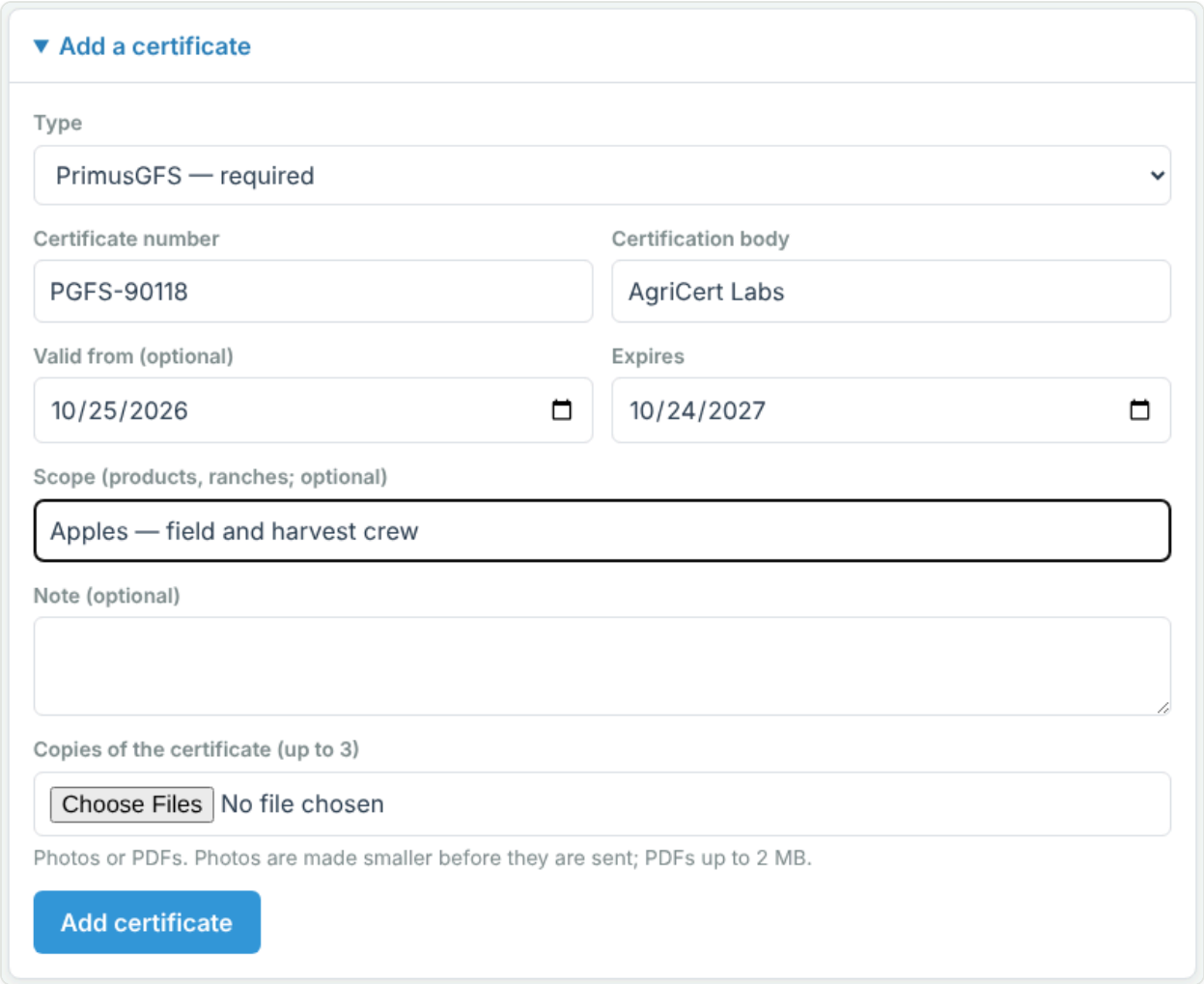
Shown as	What it means
Missing	No certificate of that type is on file.

A grower needs attention when a required certificate is expired, not valid yet or missing, or when any of its certificates is expiring soon. Certificates that aren't required are listed under Other certificates; once one of those has run out it is only shown, not flagged.

ADDING A CERTIFICATE

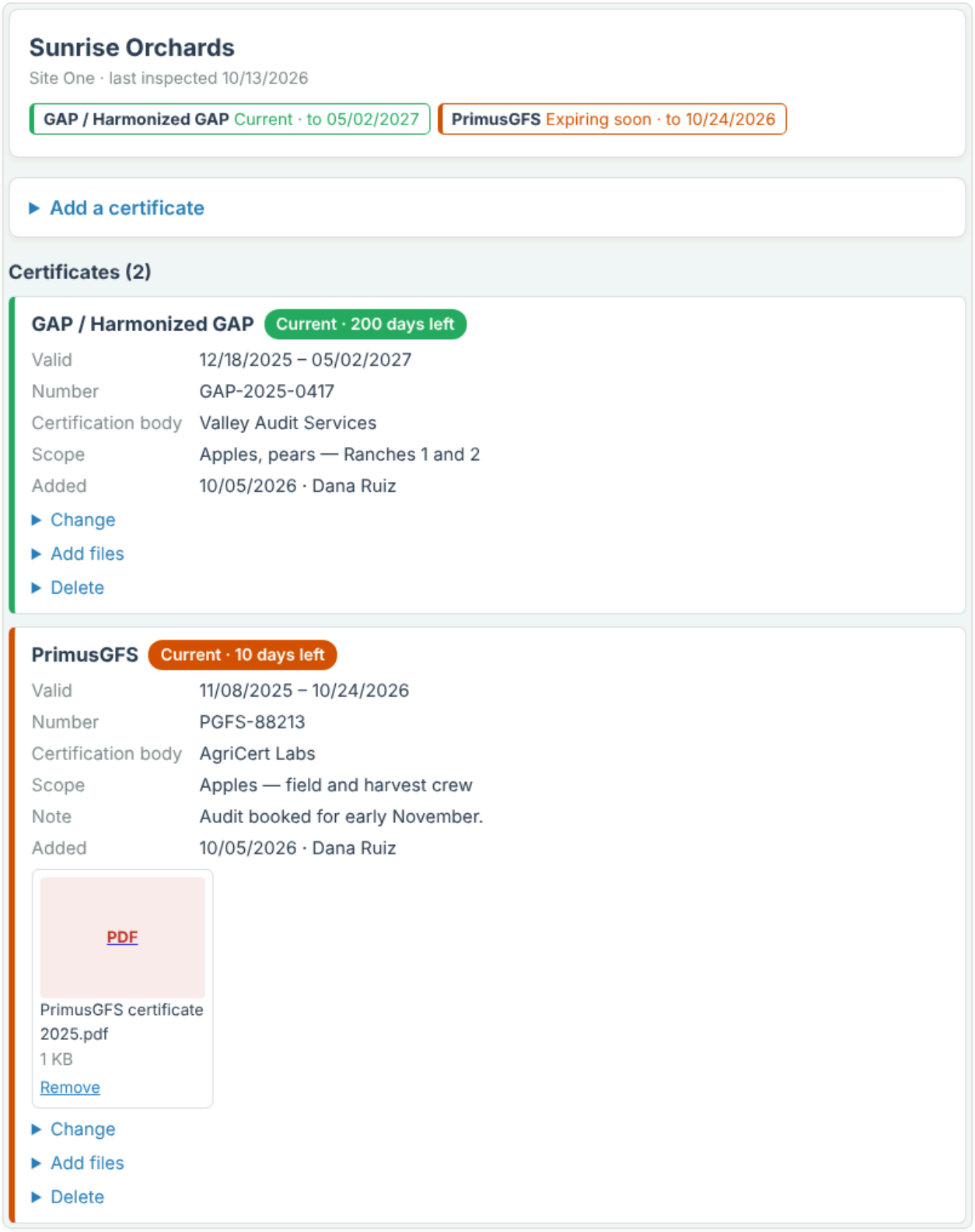
Quality Control Managers, and Users with the Grower Certificates permission, add certificates:

1. Select the grower's name in the list. The grower's page shows each required certificate, then every certificate on file.
2. Select Add a certificate.
3. Choose the Type (a Canadian site's list starts with CanadaGAP). For a certificate that isn't listed, choose Other and enter the Certificate name; Other with the name of a listed one (such as Canada GAP or FSSC22000) is saved as that type, so it counts when that type is required; a name that starts with CanadaGAP or FSSC is that type, the rest of the name (CanadaGAP Option B) going to the Scope when it is empty.
4. Enter the Certificate number, the Certification body, the date it is Valid from and the date it Expires, and, if you like, the Scope (products, ranches) and a Note.
5. Under Copies of the certificate, choose up to 3 photos or PDFs of it.
6. Select Add certificate.



Adding a renewed PrimusGFS certificate

- When a grower renews, add the new certificate as another one; don't change the old one. Valid from is required when the grower already has a certificate of that type: it shows when the new one takes over.
- A renewal entered ahead of time counts: the grower is no longer shown as Expiring soon, and nothing is flagged when the old certificate runs out.
- Photos are made smaller before they are sent. The largest PDF the server accepts is shown under the files box.



A grower's certificates

Each certificate shows how long it is valid and how many days are left, in orange within the warning period. Select a file to open it. Under each certificate: Change,

to correct its details; Add files; and, for Quality Control Managers, Delete. History, at the bottom of the page, lists every certificate added, changed or deleted and every file added or removed, with who did it and when; changes show the old and new values.

The organic and PrimusGFS certificates of the growers that Buyer Compliance keeps (see 6.64) are added here too, as Organic or PrimusGFS, when they are added there by hand or read from USDA Organic INTEGRITY through its API (from Azzule once its API is connected), with their files; a PrimusGFS certificate has the audit's date and score in its note, which also says where it came from. The same certificate isn't added twice.

> **Note:** Deleting a certificate needs a reason. The certificate stays on the grower's page marked Deleted, with who deleted it, when and why, but no longer counts. A file can be removed by whoever added it, or by a Quality Control Manager.

WARNINGS ON LOTS, ALERTS AND THE DASHBOARD

When the site requires certificates, a lot whose grower had no required certificate on file, or one that was not current on the inspection date, gets a warning: under the grower on Lot Disposition (6.7) and in the window where the lot is decided, and under the inspection on Edit Quality Inspections, with a See certificates link. The warning is for information: the lot is decided as usual.

Date Inspected	Serial / Lot Number	Grower	Product Inspected	Disposition
10/13/2026	1779120000 Lot L-20000	Valle Verde Farms ⚠ Grower certificate: GAP / Harmonized GAP not current on the inspection date	Apples · Gala	On hold Dana Ruiz 10/13/2026 9:00 AM Change
10/13/2026	1779062400 Lot L-62400	Sunrise Orchards	Tomato · Roma	Accepted Dana Ruiz 10/13/2026 9:00 AM Change
10/12/2026	1779163200 Lot L-63200	Cañada Ranch	Tomato · MgrVar2	Accepted Dana Ruiz 10/12/2026 9:00 AM Change
10/11/2026	1779192000 Lot L-92000	Desert Bloom Growers ⚠ Grower certificate: no GAP / Harmonized GAP on file; no PrimusGFS on file	Tomato · Roma	Accepted Dana Ruiz 10/11/2026 9:00 AM Change

Certificate warnings on Lot Disposition

- Trend Alerts (6.13) reports active growers with a required certificate expired or not valid yet, certificates expiring soon with no renewal on file, and the active growers missing a required certificate. These alerts are emailed to the site's Quality Control Managers with the others, and clear once the certificate is on file. To turn them off, clear Report certificates on Trend Alerts and its daily email in Settings.
- The QA Dashboard (6.14) counts the active growers with a required certificate expired or missing, and the certificates expiring soon.
- On a grower's page, Ask the grower for a current ... certificate sends the grower an action request for a required certificate that is expired, missing, not valid yet or expiring soon, and Request action from the grower starts any other request (see 6.19).

- A grower's page also shows its approval, with See approval to open it (see 6.21).

> **Note:** Give Users the Grower Certificates permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections); they see it after they next sign in. Quality Control Managers have it already. Only Quality Control Managers delete certificates and change the settings.

ASKING MANY GROWERS AT ONCE

With more than one site, the list can show all your sites, a site group, sites chosen or a view (see 6.68), with a Site column; adding a certificate and the settings need one site. Someone with more than one site and the Grower Action Requests page can ask many growers for their current certificates together:

1. Tick the growers: those with a required certificate expired, missing, not valid yet or expiring have a box.
2. Under Ask the ticked growers for their current certificates, set Answer by (14 days from today to start with), and leave Email each request to the grower's users ticked or clear it.
3. Select Send the requests and confirm.

Each ticked grower gets a grower action request for each of those certificates ("Please send us a copy of your current ... certificate"), at their own site, as Ask the grower sends one (see 6.19); at most 500 growers at a time. A certificate already asked for in a request not closed is skipped (Already asked: AR-3 is not closed yet.), and the grower's row shows it under the certificate (PrimusGFS asked: AR-3). The page then says Requests for current certificates. Saved: N · Skipped: N · Not saved: N.

6.16 Inspection Sign-off

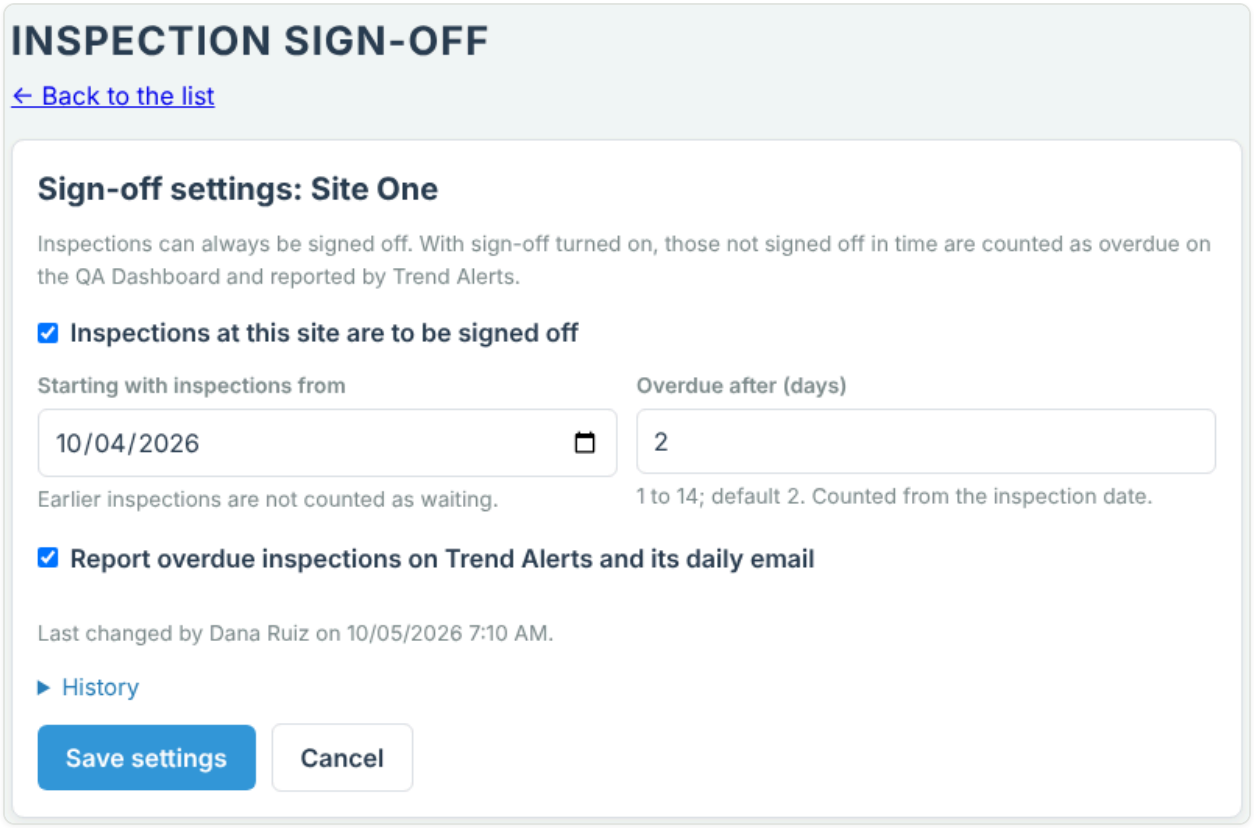
Lots > Inspection Sign-off is where a Quality Control Manager, or a User with the Inspection Sign-off permission, reviews the site's inspections and signs them off,

as food safety audits such as PrimusGFS, SQF and BRCGS expect monitoring records to be reviewed by a responsible person. Each sign-off keeps who signed it off, when and a note. Nobody signs off an inspection they did themselves.

TURNING SIGN-OFF ON

Inspections can always be signed off. To have those not signed off in time counted as overdue, a Quality Control Manager turns sign-off on for the site:

1. Go to Lots > Inspection Sign-off (choose the Site and select Apply Filter if you have more than one), and select Settings.
2. Tick Inspections at this site are to be signed off.
3. In Starting with inspections from, choose the first inspection date to sign off (today, to start with). Earlier inspections are not counted as waiting.
4. Set Overdue after (days), from 1 to 14 (2 by default), counted from the inspection date: with 2, an inspection from Monday is overdue on Thursday.
5. Leave Report overdue inspections on Trend Alerts and its daily email ticked, or clear it, and select Save settings.

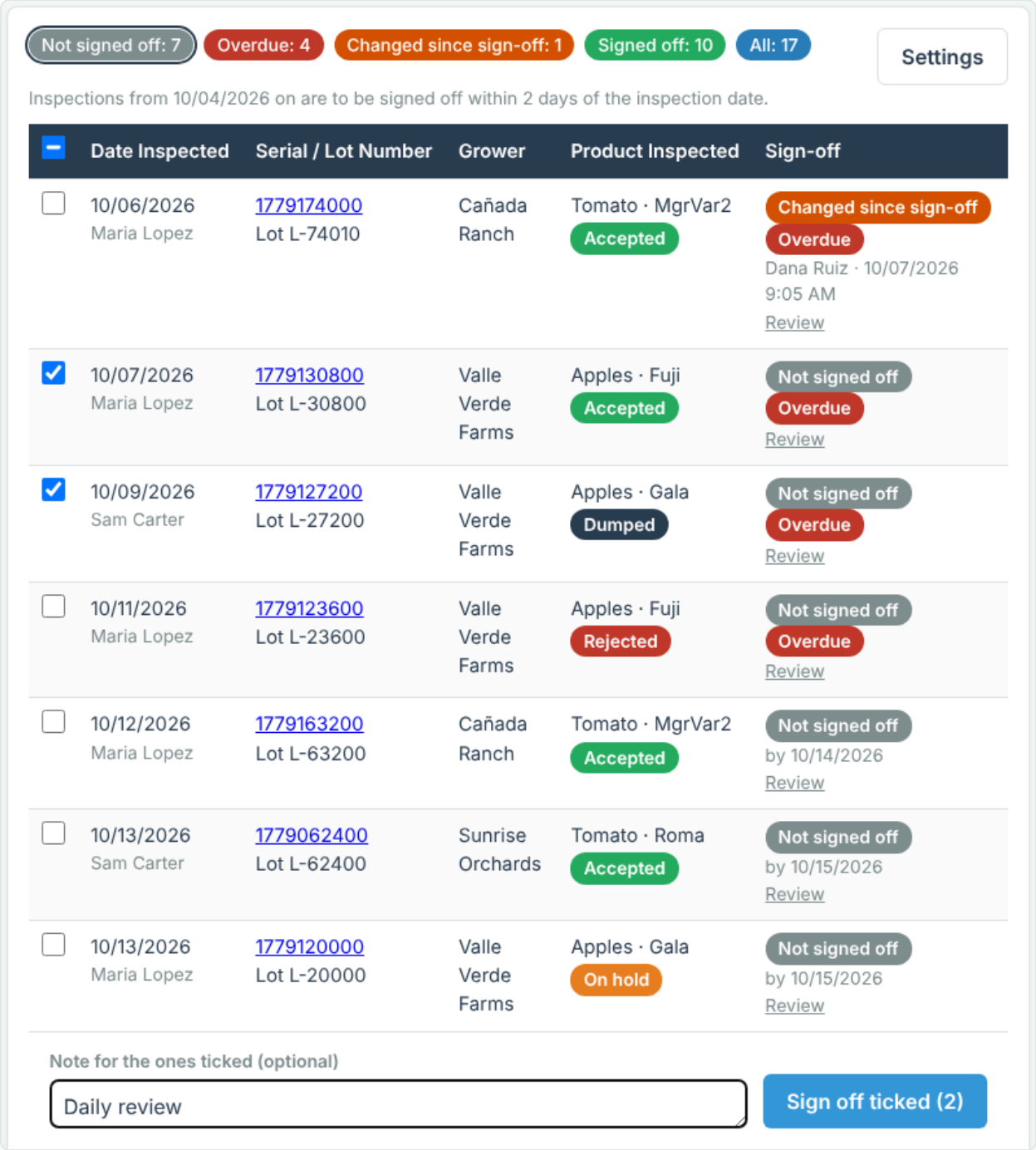


Sign-off settings for a site

> **Note:** Each change to the settings is kept in History, with who made it.

SIGNING OFF INSPECTIONS

Lots > Inspection Sign-off lists the inspections not signed off yet, the oldest first, from the date sign-off started (at most the last 13 weeks; while sign-off is off, the last 14 days). Change the dates, or search for a serial or lot number, and select Apply Filter. Select one of the colored counts to see only the overdue ones, those changed since their sign-off, those signed off, or all of them.



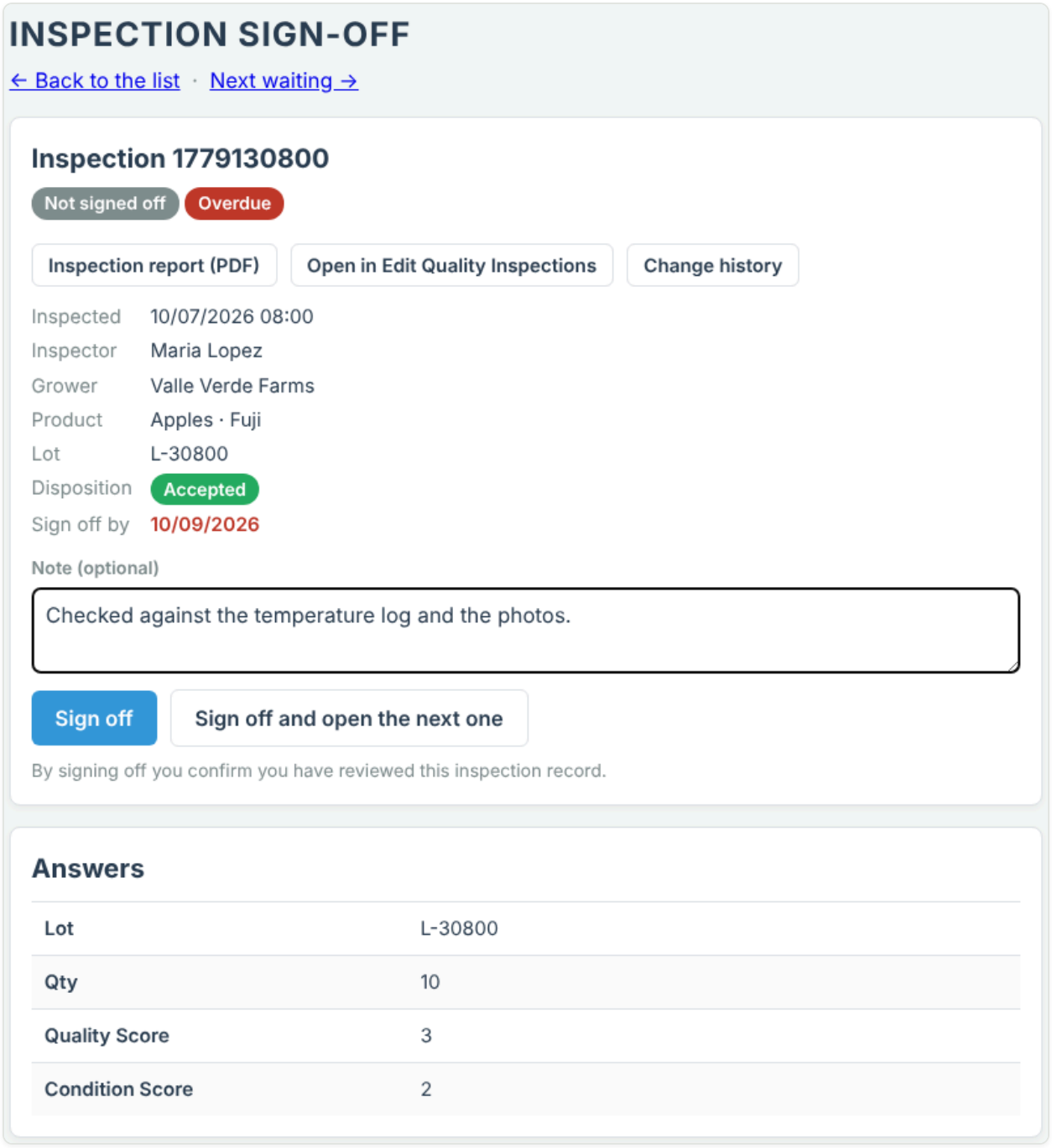
Inspections waiting for sign-off

Shown as	What it means
Not signed off	Nobody has signed it off yet. While sign-off is on, "by" shows the last day to sign it off before it is overdue.

Shown as	What it means
Overdue	Not signed off, or changed since its sign-off, and past the overdue period (2 days by default).
Changed since sign-off	Edited on Edit Quality Inspections after it was signed off: it waits to be signed off again.
Signed off	Signed off and not changed since, with who signed it off and when.

To review one inspection and sign it off:

1. Select its serial number, or Review. The page shows the inspection’s details and every answer, with buttons for the inspection report (PDF), Edit Quality Inspections and the change history.
2. Check the inspection. If you like, write a Note, for example what you checked it against.
3. Select Sign off, or Sign off and open the next one to go straight on to the next inspection waiting.



Reviewing an inspection

To sign off several inspections together, tick them in the list (the box in the heading ticks them all), write a note for them if you like, and select Sign off ticked.

With more than one site, the Site list also offers All my sites, a site group, Choose sites... and your views (see 6.68): the inspections of those sites are listed together, with a Site column, 50 a page, and those ticked at several sites are signed off together, each at its own site (at most 500 at a time). Sign-off is off for 1

of these sites: nothing there is counted as overdue. Its inspections can still be signed off. says when sign-off is off at some of them. The Settings need one site: Choose a site to change its settings.

> **Note:** Your own inspections have no tick box: someone else signs them off. An inspection counts as yours when any of its answers was recorded under your user.

> **Tip:** Select Next waiting at the top of an inspection to go on to the next one without signing it off.

> **Note:** When the site checks inspector training, an inspection by someone not qualified for the commodity shows a warning in the list and on its page, so you can take it into account before signing it off (see 6.18).

CHANGES AND WITHDRAWN SIGN-OFFS

- When a signed-off inspection is edited on Edit Quality Inspections (an answer, the grower, the variety, packaging, sizes or a photo), it shows Changed since sign-off and is listed again with those not signed off. Its page says who signed it off and when, and See what changed opens Inspection Change History (6.8). Review the change and sign it off again. Recording the time a lot went out doesn't count as a change.
- Whoever signed off an inspection, or a Quality Control Manager, can withdraw the sign-off: open the inspection, select Withdraw this sign-off, say why, and select Withdraw sign-off. The inspection is then waiting again.
- Every sign-off and withdrawal stays in the inspection's Sign-off history, and in Inspection Change History.

WHERE SIGN-OFFS SHOW

- Edit Quality Inspections shows under each inspection who signed it off and when, that it changed since, or that it isn't signed off yet, with a link to this page (6.6).

- The inspection report (PDF) says who signed the inspection off and when, under the signatures.
- The QA Dashboard (6.14) counts the inspections overdue, not signed off and changed since their sign-off.
- Trend Alerts (6.13) reports inspections not signed off in time, and emails the alert to the site's Quality Control Managers with the others.

> **Note:** Give Users the Inspection Sign-off permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections); they see it after they next sign in. Quality Control Managers have it already. Only Quality Control Managers change the settings and withdraw other people's sign-offs.

6.17 Audit Pack

Overview > Audit Pack makes one PDF for an auditor, for example for a PrimusGFS, SQF or BRCGS audit: a site's quality records for a period of up to 13 months, with a cover, the contents and a summary. It only reads what is already recorded; it changes nothing.

MAKING AN AUDIT PACK

1. Go to Overview > Audit Pack, or select Audit pack on the QA Dashboard.
2. Choose the Site, and the period in From and To (the last 12 months to start with). The buttons under the dates fill in the last 12, 6 or 3 months, last year, or this year so far.
3. Choose the Language of the pack: English or Español.
4. Under Sections, clear any you don't need. All are ticked to start with, and the Summary is always included.
5. Select Make audit pack (PDF). The PDF downloads when it is ready; a year at a busy site can take a minute.



Choosing what goes in an audit pack

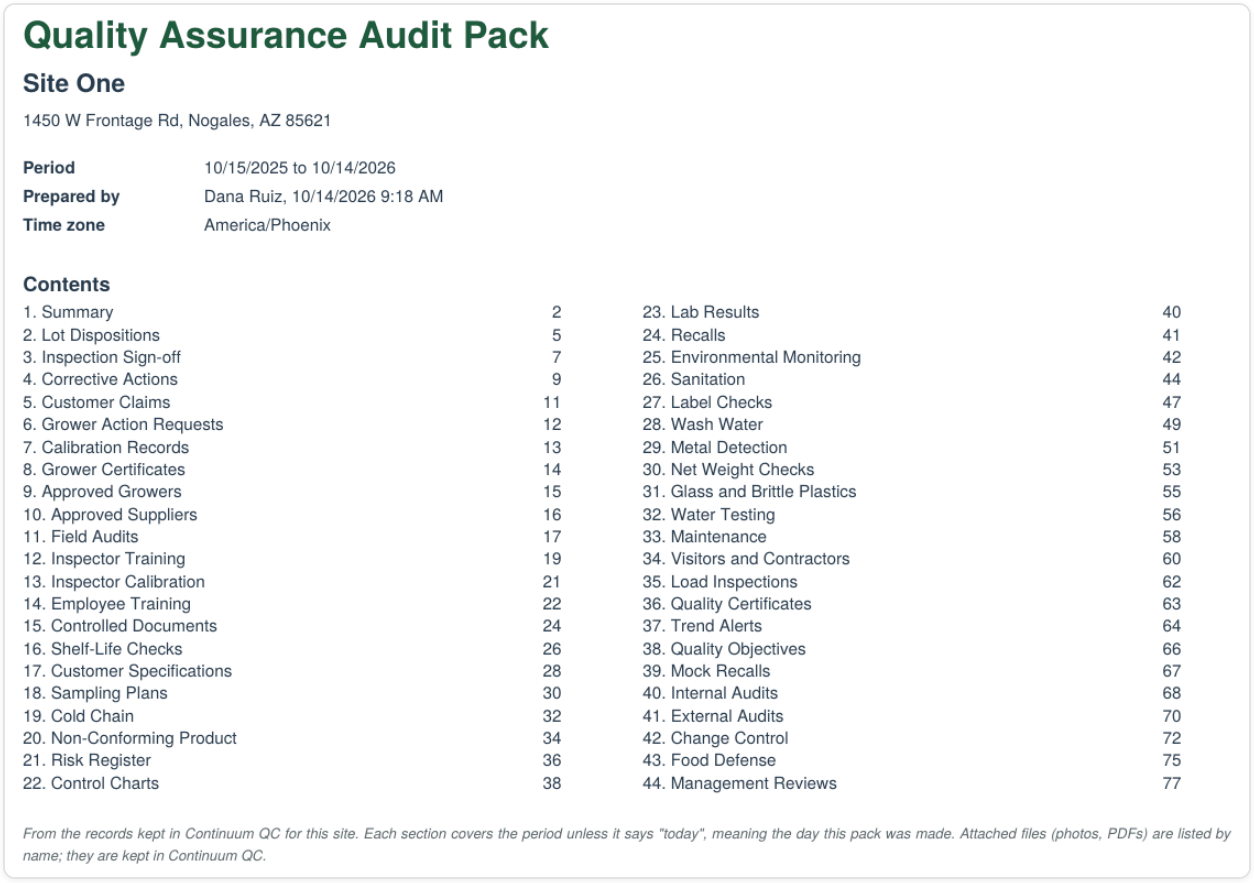


Choosing what goes in an audit pack (continued)

WHAT'S IN THE PACK

The cover names the site and its address, the period, who made the pack and when, and the time zone of the dates and times in it (the site's). The contents list

the sections with their page numbers; select one to go to it. Each section is a table, with its heading repeated on every page.



Quality Assurance Audit Pack

Site One

1450 W Frontage Rd, Nogales, AZ 85621

Period	10/15/2025 to 10/14/2026
Prepared by	Dana Ruiz, 10/14/2026 9:18 AM
Time zone	America/Phoenix

Contents

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From the records kept in Continuum QC for this site. Each section covers the period unless it says "today", meaning the day this pack was made. Attached files (photos, PDFs) are listed by name; they are kept in Continuum QC.

The cover of an audit pack

Section	What it shows
Summary	Always included: the number of inspections and the main figures of every section chosen, on one page.
Lot Dispositions	Every lot inspected in the period that was put on hold, rejected, dumped or accepted with conditions, with all its decisions (who, when and the note); then the lots still waiting for a decision (see 6.7).
Inspection Sign-off	Inspections signed off, by inspection date, with who signed them off; then those not signed off or changed since their sign-off, with the overdue ones marked. With sign-off on, it covers the inspections from the date sign-off started (see 6.16).

Section	What it shows
Corrective Actions	Every corrective action open at any time in the period, with its source, problem, owner, due date, root cause and action, and how it was closed and verified (see 6.9).
Customer Claims	Claims received in the period, with the lot, reason, amount, decision, credit and attached files, and the totals (see 6.10).
Grower Action Requests	Requests to growers open at any time in the period, with what was asked, the grower's answer and how it was reviewed (see 6.19).
Calibration Records	Every instrument with its status today, and the calibrations recorded in the period, with their readings, results (with the calibration's note under the result) and certificates; voided ones are shown as voided (see 6.12).
Grower Certificates	Certificates valid in the period or later, with their status today, and the active growers missing a required certificate (see 6.15).
Approved Growers	The approved grower list today, with what each approval is based on, its conditions and files; the approval decisions made in the period; and the lots of the period from growers suspended or not approved on the inspection date, with their disposition today (see 6.21).
Approved Suppliers	The suppliers today (not set aside), each with its category, its approval and conditions, how each document its category needs stands, with its expiry date, and its next review; and the supplier reviews of the period, with who reviewed, the decision, the conditions, the documents missing or expired and why, and the corrective action raised from it (see 6.45).
Field Audits	The fields in use today with their commodity and harvest, how each stands today and its latest assessment; and the assessments of the period with who, the outcome, until when, the corrective action, the risks found with what was seen, the conditions and why (see 6.53).

Section	What it shows
Inspector Training	Training sessions held in the period, with who attended and what they qualify for; each inspector’s qualifications today; and, when the site checks inspector training, the inspections in the period by someone not qualified (see 6.18).
Inspector Calibration	The tolerances and the schedule; the calibration checks dated in the period, with each inspector’s result against the lead and what they were out on; and where each inspector stands today (see 6.26).
Employee Training	The courses with how often they are taken, who must take them and how soon, and their sessions; the sessions of the period with the trainer and the language, how many attended (and didn’t pass) and whether there is a sign-in sheet; and the workers overdue on the last day of the period, with each course and its state (see 6.52).
Controlled Documents	The document register today (the version in effect, who approved it, the last and next review, and how many confirmed reading it); the versions published and the reviews recorded in the period; and who hasn’t confirmed the newest versions. For Quality Control Managers only (see 6.22).
Shelf-Life Checks	The shelf-life plans today; and every sample kept in the period with its lot, grower and plan, each check (the day, date, score, decay or defects and result) and how the sample ended, with the corrective action raised from a failure (see 6.23).
Customer Specifications	Each customer’s specs today with their limits; the versions added in the period, with what changed; and the lots recorded as going to customers in the period, with how each stood against the spec and why the ones outside it went anyway (see 6.24).

Section	What it shows
Quality Certificates	The quality certificates issued in the period, with who issued them, the lot, the customer, how the lot stood against the spec (and why it was released when it didn't meet it) and where each was emailed, and the voided ones with why and what replaced them; then the lots of the period going to customers who need a certificate that have none today (see 6.25).
Trend Alerts	Alerts active at any time in the period, with who reviewed them and when they cleared (see 6.13).
Quality Objectives	The quality objectives whose 12 months overlap the period, each with its target, year to date, status and monthly figures; and the months off track in the period, with why and what was done, and any corrective action (see 6.27).
Mock Recalls	The mock recalls started in the period, each with the lot, the pretend reason, the time taken, how much of the lot was accounted for, the customers confirmed and those the records missed, and the result; then what each showed, what will change and any corrective action (see 6.28).
Internal Audits	The audit plan today; the internal audits of the period with their checklist and version, who audited, the score and the answers; the auditors' summaries; and the findings open at any time in the period, each with its owner and due date and where it stands today: what was done and the evidence's file names, or its corrective action (see 6.29).
External Audits	The programs today with their certificates, plan and latest audit; the external audits of the period with the kind of visit, the auditor, the scope, the outcome with the score or grade, the non-conformances and the report's file names; the auditors' summaries; and the non-conformances open at any time in the period, each with its owner and due date and where it stands today: what was done and the evidence's file names, when it was sent and accepted, and any corrective action (see 6.30).

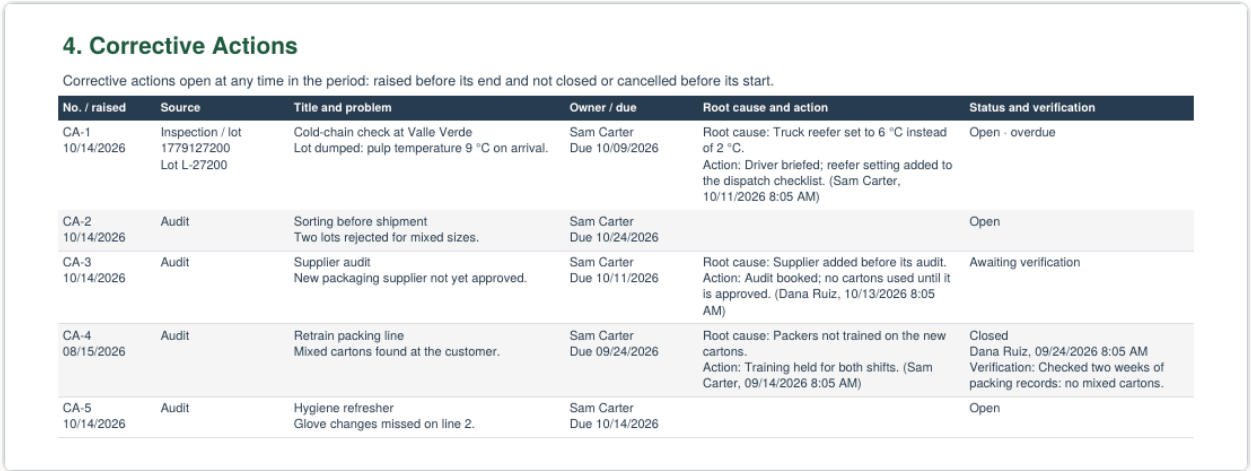
Section	What it shows
Change Control	The changes open at any time in the period, each with what changes, who requested it, its risk and what it affects, the decision and its conditions, and where it stands today: in effect, checked and whether it worked, and any corrective action; then what each will change and why, and its actions with their owner, due date, what was done and the evidence's file names (see 6.31).
Food Defense	The security checks due whose day or week ended in the period, each with its status and its checks with what was found not OK, and the extra checks; the incidents of the period with the product possibly affected, its lots and what was done with it, the status and who it was reported to; and the vulnerability assessment today, with its points by score, and its reviews of the period (see 6.54).
Management Reviews	Management reviews held in the period, with who attended and what was concluded; then the review actions open at any time in the period, with their status today (see 6.20).
Sampling Plans	The sampling plans in force in the period, each commodity's versions with their rows; the results by commodity (checked, accepted, rejected, too few units, no lot size, no plan); and each inspection not accepted, with how it stood against its plan (see 6.33).
Cold Chain	The commodity temperature limits in force in the period; the places logged, with their readings, those out of range and the lowest and highest; each storage reading out of range with what was done (and its lot, for one from the app); and each lot out of range, with its temperatures against the limits (see 6.34).
Non-Conforming Product	The non-conforming product found in the period by kind of problem and decision; and each record with the product, quantity and where it was held, what was wrong, the decision and what was done (see 6.35).

Section	What it shows
Risk Register	The register today, each risk with its scores before the controls and with them, the controls, the further action, who looks after it and its next review; the reviews held in the period; and the risks retired in it (see 6.36).
Control Charts	The charts with control limits and points in the period, each with its limits and baseline, the period’s mean and sigma, its signals and its capability (Cpk) against each customer spec; the signals; and the control limits set and withdrawn in the period (see 6.37).
Lab Results	The lab tests reported in the period, each with its results against each market’s limits and what was done about a failure; and the tests waiting for results today (see 6.38).
Recalls	The recalls and withdrawals started, open or closed in the period, each with what and why, the lots, the customers told and confirmed, the checks and the regulator, what was recovered and how it ended (see 6.39).
Environmental Monitoring	The program today, the swab points by zone and the schedule; the swabs taken in the period by zone and test, with those positive or failed, and the routine swabs done of those due; and the positives found in the period or open at its end, with their re-swabs, the points around them, the lots flagged, what was done and how they ended (see 6.40).
Sanitation	The program today: the areas with their pre-op checklists, the master sanitation schedule and the settings; the pre-op checks of the period by area, done, released the first time, released anyway, never released, missed and with no production, with the items that failed first most often and why areas were released anyway; and the cleaning of the period by task, done, verified, missed, skipped and sent back (see 6.41).

Section	What it shows
Label Checks	The program: the packing lines, the settings and the approved labels with what each must show; the start-up checks of the period by line, due, done, missed and not running, with the checks late; the checks by approved label; the items found wrong most often; and each wrong label, what was wrong and how it ended (see 6.42).
Wash Water	The wash points today, with the sanitizer, the limits and how often the water is changed, and the settings; the period by wash point, the days due, checked, missed and not running, with the checks late, the checks, those out of range and the water changes; what was out of range at the first reading, by measure, below or above the limit; and each reading out of range, what was done with the product and how it ended (see 6.43).
Metal Detection	The detectors today, with their test pieces and how often each is checked, and the settings; the period by detector, the days due, checked, missed and not running, with the checks late, the checks, those failed and the foreign material found; what failed at the first test, by test piece (not detected, or detected, not rejected) and the reject device not working; each failed check, what was done with the product and how it ended; and the foreign material found (see 6.46).
Net Weight Checks	The packs today, with their declared weight and tare, the lowest net weight allowed (by the legal tolerance of the site's country, or set for the pack) and how many packages a check weighs; the period by pack, the checks, those failed, the average net weight against the declared and the give-away; and each failed check, what was weighed, why it failed, what was done with the product and how it ended: checked again, closed, or its corrective action (see 6.47).

Section	What it shows
Glass and Brittle Plastics	The register today by area, each item with its material, how many, whether it is of high risk and whether it is damaged or missing, with the area's last and next check; the area checks of the period by area, the checks, those done late and the items found damaged or missing; and each breakage of the period, what happened, the product exposed and the lots, what was done with the product, the cleanup and the clearance, and its corrective action (see 6.48).
Water Testing	The water sources and their tests today, each source with its kind and what its water is used for, each test with its limit and how often, its last sample and its next one (a retest, or overdue); and each sample of the period with its result and limit, its status, the lab, what was done, how it was closed and its corrective action (see 6.49).
Maintenance	Each work order requested in the period with where, what was to be done, the work done (and by a contractor), the temporary repair, the times it was sent back, the hygiene clearance and its corrective action; the temporary repairs not made permanent today; the planned maintenance today (each task, how often, when it was last done and is next due); and the planned maintenance done in the period, with how much of it was done on time (see 6.50).
Visitors and Contractors	The visits of the period by who (visitors, contractors, truck drivers, auditors and inspectors), with those entering production, those not allowed in and those allowed by a Quality Control Manager; each visit entering the production areas with who, who they visited and why, the escort, the health questions and the entry; and those not signed out (see 6.51).
Load Inspections	The trailer checklist today, with its critical items, and the settings; the loads decided in the period by customer, released, released with problems and rejected; the checklist items that failed; and each load rejected or released with problems, with its problems, the decision and why, and its corrective action (see 6.44).

Section	What it shows
CanadaGAP	At a site that follows CanadaGAP: the scope and certificate; each form with its records in the period, its state this season and its confirmations; the agronomic input applications with their PHI and EAHD, and their verification; the harvests recorded before the EAHD, with the reason; the assessments; and the pest monitoring findings with the action taken (see 6.75 to 6.80). The section is offered only while the CanadaGAP module is on.
Mexico (SENASICA)	At a site that follows Mexico: the certificates and recognitions; where the cycle stands, requirement by requirement; the audits, inspections and visits with their findings; the rejections and when SENASICA was told; the hazard analyses and technical plan in force; the pesticide and fertilizer applications, the harvests within the safety interval and the inputs received; the harvest crew checks and the crews' analyses; and the hot-water runs (see 6.81 to 6.84). The section is offered only while the Mexico module is on.



4. Corrective Actions

Corrective actions open at any time in the period: raised before its end and not closed or cancelled before its start.

No. / raised	Source	Title and problem	Owner / due	Root cause and action	Status and verification
CA-1 10/14/2026	Inspection / lot 1779127200 Lot L-27200	Cold-chain check at Valle Verde Lot dumped: pulp temperature 9 °C on arrival.	Sam Carter Due 10/09/2026	Root cause: Truck reefer set to 6 °C instead of 2 °C. Action: Driver briefed; reefer setting added to the dispatch checklist. (Sam Carter, 10/11/2026 8:05 AM)	Open · overdue
CA-2 10/14/2026	Audit	Sorting before shipment Two lots rejected for mixed sizes.	Sam Carter Due 10/24/2026		Open
CA-3 10/14/2026	Audit	Supplier audit New packaging supplier not yet approved.	Sam Carter Due 10/11/2026	Root cause: Supplier added before its audit. Action: Audit booked; no cartons used until it is approved. (Dana Ruiz, 10/13/2026 8:05 AM)	Awaiting verification
CA-4 08/15/2026	Audit	Retrain packing line Mixed cartons found at the customer.	Sam Carter Due 09/24/2026	Root cause: Packers not trained on the new cartons. Action: Training held for both shifts. (Sam Carter, 09/14/2026 8:05 AM)	Closed Dana Ruiz, 09/24/2026 8:05 AM Verification: Checked two weeks of packing records: no mixed cartons.
CA-5 10/14/2026	Audit	Hygiene refresher Glove changes missed on line 2.	Sam Carter Due 10/14/2026		Open

A section of an audit pack

- "Today" in a heading means the day the pack was made, for example an instrument's status today.
- Attached files, such as claim photos and calibration certificates, are listed by name; they stay in Continuum QC.

- A record made in the Food Safety app (see 6.71) shows, on a line of its own, the Location and Area the inspector answered there, such as Location: Packing house · Area: Conveyor: in the calibrations, the environmental positives (the swab that found them), the areas released anyway, the wash water readings out of range, the failed metal detector checks, the foreign material found, the glass breakages, the work orders and temporary repairs, the planned maintenance done, the visits entering production and the visitors not signed out. A place the line already names isn't repeated; a work order shows its request's answers. The cover says so.
- A table shows at most 2,000 rows and says how many more there are; choose a shorter period to include them. Very long texts are cut, ending in "…".
- A pack in Español has its headings and figures in Spanish; text entered in Continuum QC, such as notes, customers and instruments, appears as it was entered.

> **Tip:** Keep each audit's pack with your audit records: it shows what Continuum QC held on the day it was made.

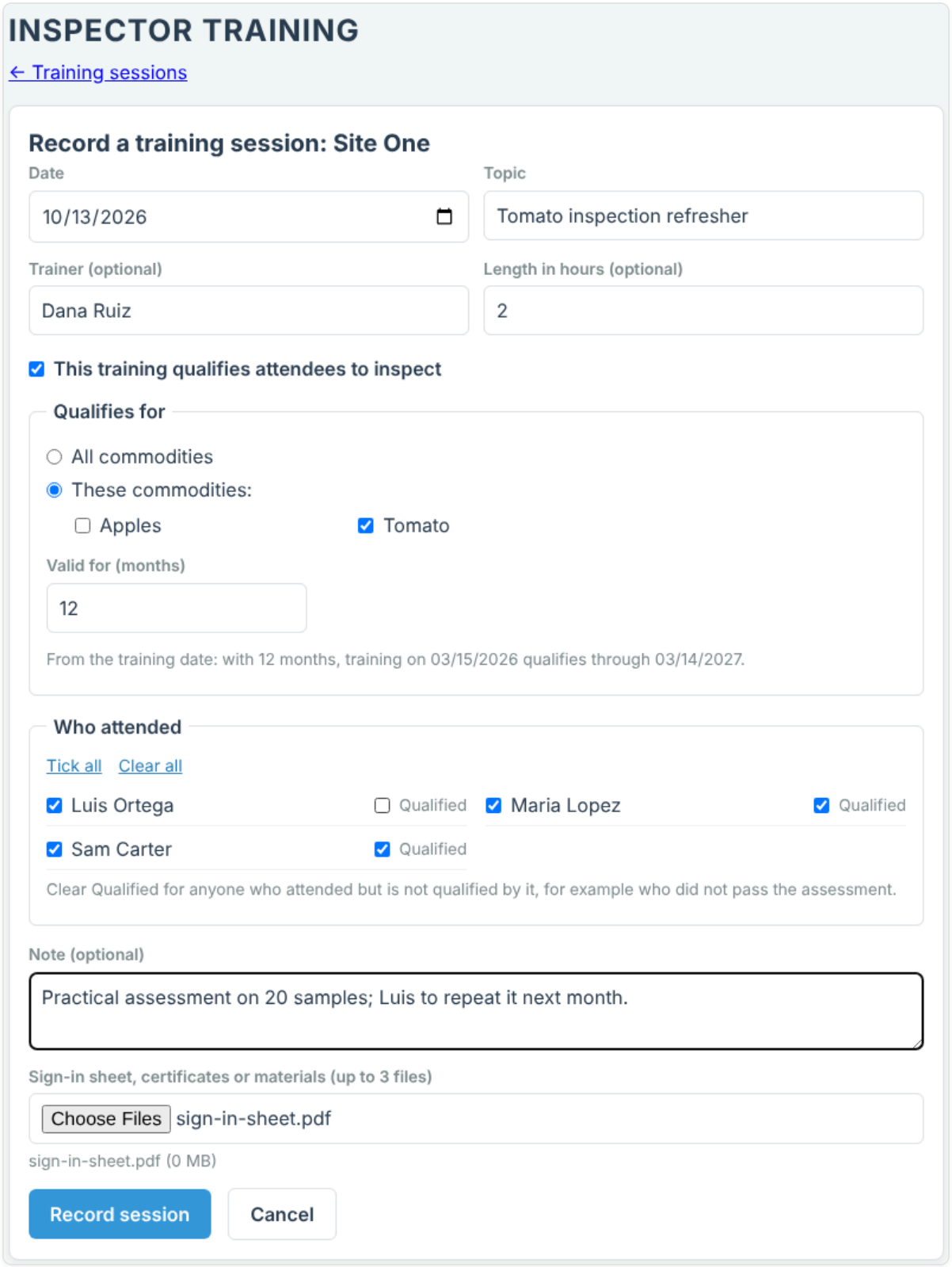
> **Note:** A section is offered only when that feature is set up for the company and the person can open the page behind it, so a User's pack never shows more than they can see in Continuum QC. Give Users the Audit Pack permission on gear > Users > Add / Change User Permissions; they see it after they next sign in. Quality Control Managers have it already.

6.18 Inspector Training

Growers > Inspector Training keeps the training your inspectors receive — the topic, the date, the trainer, who attended and the sign-in sheet — and who is qualified to inspect which commodities, and until when, as food safety audits such as PrimusGFS, SQF and BRCGS expect. When a Quality Control Manager turns the check on for a site, inspections by someone not qualified for the commodity are flagged across Continuum QC.

RECORDING A TRAINING SESSION

1. Go to Growers > Inspector Training (choose the Site and select Apply Filter if you have more than one), and select Record a training session.
2. Enter the Date of the training (not in the future) and the Topic and, if you like, the Trainer and the Length in hours.
3. To qualify the attendees, leave This training qualifies attendees to inspect ticked, choose All commodities or tick them under These commodities, and check Valid for (months) (12 by default). For a training record only, such as a GMP or hygiene refresher, clear the tick.
4. Under Who attended, tick each attendee. Clear Qualified for anyone who attended but isn’t qualified by it, for example who didn’t pass the assessment.
5. If you like, write a Note and choose up to 3 photos or PDFs of the sign-in sheet, certificates or materials. Select Record session.



Recording a training session

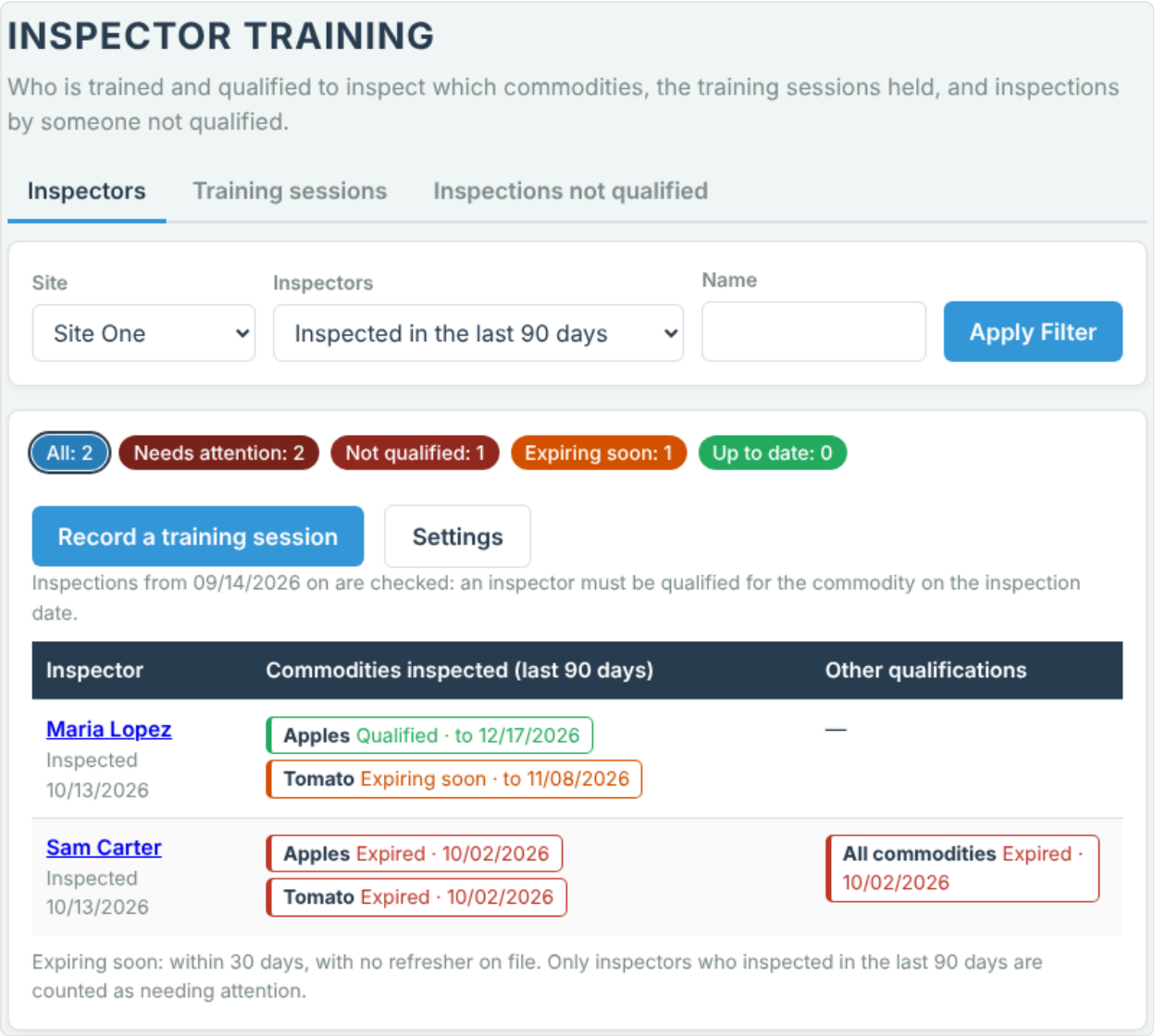
- A qualification is valid from the training date through the day before the same date that many months later: with 12 months, training on 03/15/2026 qualifies

through 03/14/2027.

- A refresher held before a qualification runs out continues it with no gap.
- Who attended lists the site’s Users and anyone who inspected at the site in the active period (90 days by default).
- Photos are made smaller before they are sent. The largest PDF the server accepts is shown under the files box.

WHO IS QUALIFIED

Growers > Inspector Training opens on Inspectors: everyone who inspected at the site in the active period, with each commodity they inspected and any other qualifications. Under Inspectors, choose All inspectors and trainees to include those not inspecting recently, or type part of a Name, and select Apply Filter. Select one of the colored counts to see only those who need attention, are not qualified, have a qualification expiring soon, or are up to date.



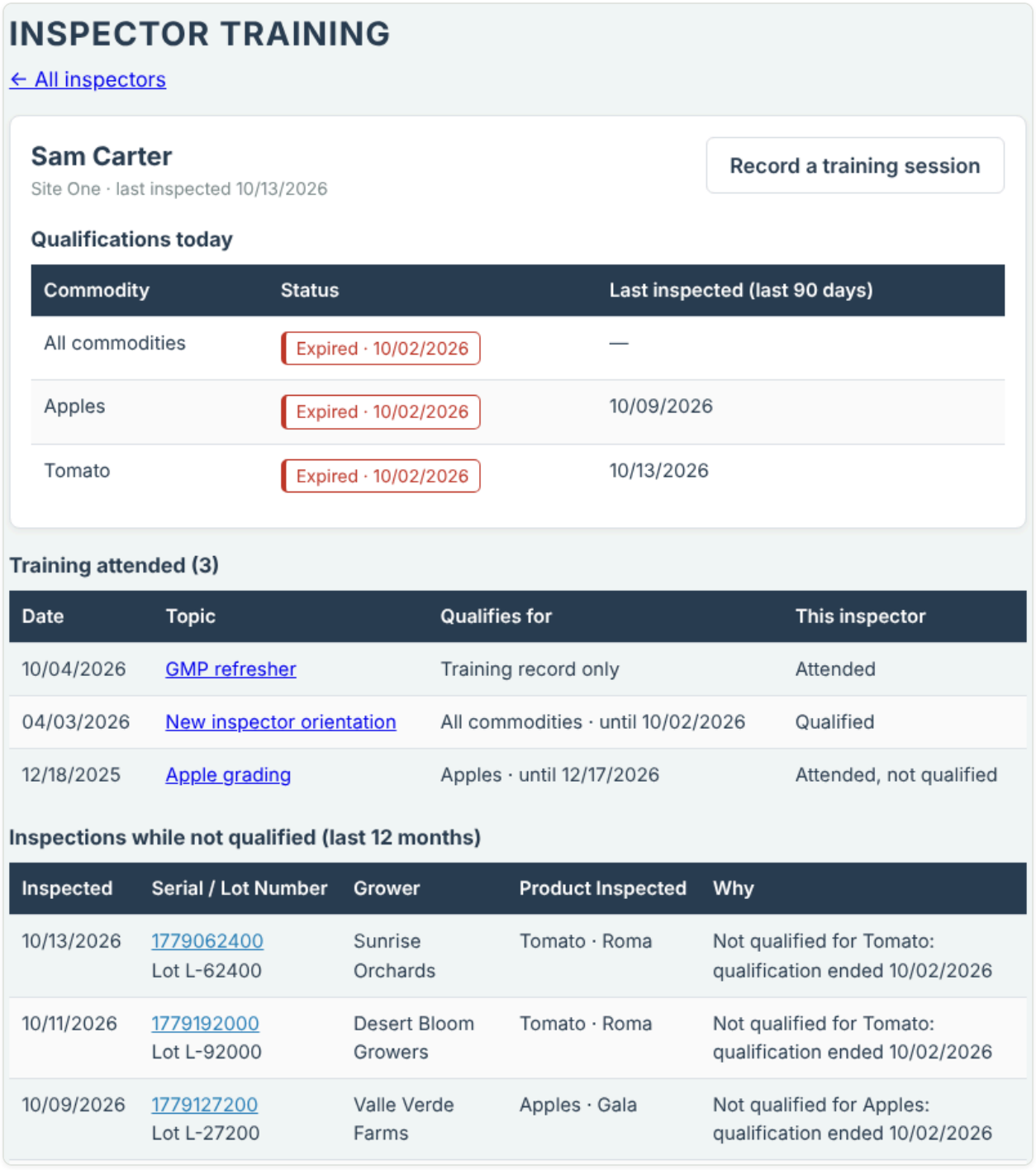
Inspectors and their qualifications

Shown as	What it means
Qualified	Qualified to inspect the commodity, with the date the qualification lasts to.
Expiring soon	The qualification runs out within the warning period (30 days by default), and no refresher is on file.
Expired	The last qualification for the commodity ended on the date shown.

Shown as	What it means
Not qualified	No qualification for the commodity is on file. The Not qualified count also includes expired ones.

An inspector needs attention when they aren’t qualified for a commodity they inspected in the active period, or when a qualification is expiring soon. Only active inspectors are counted: those who inspected at the site in the active period and whose account isn’t deactivated.

Select an inspector’s name to see their qualifications today, the training they attended, and their inspections while not qualified in the last 12 months. Record a training session on that page starts a session with them ticked.



An inspector's training

Training sessions, at the top of the page, lists the sessions of the last 12 months, newest first, with what they qualify for, who attended and their files. Change the dates, or search for a topic or trainer, and select Apply Filter. Select a topic to open the session.

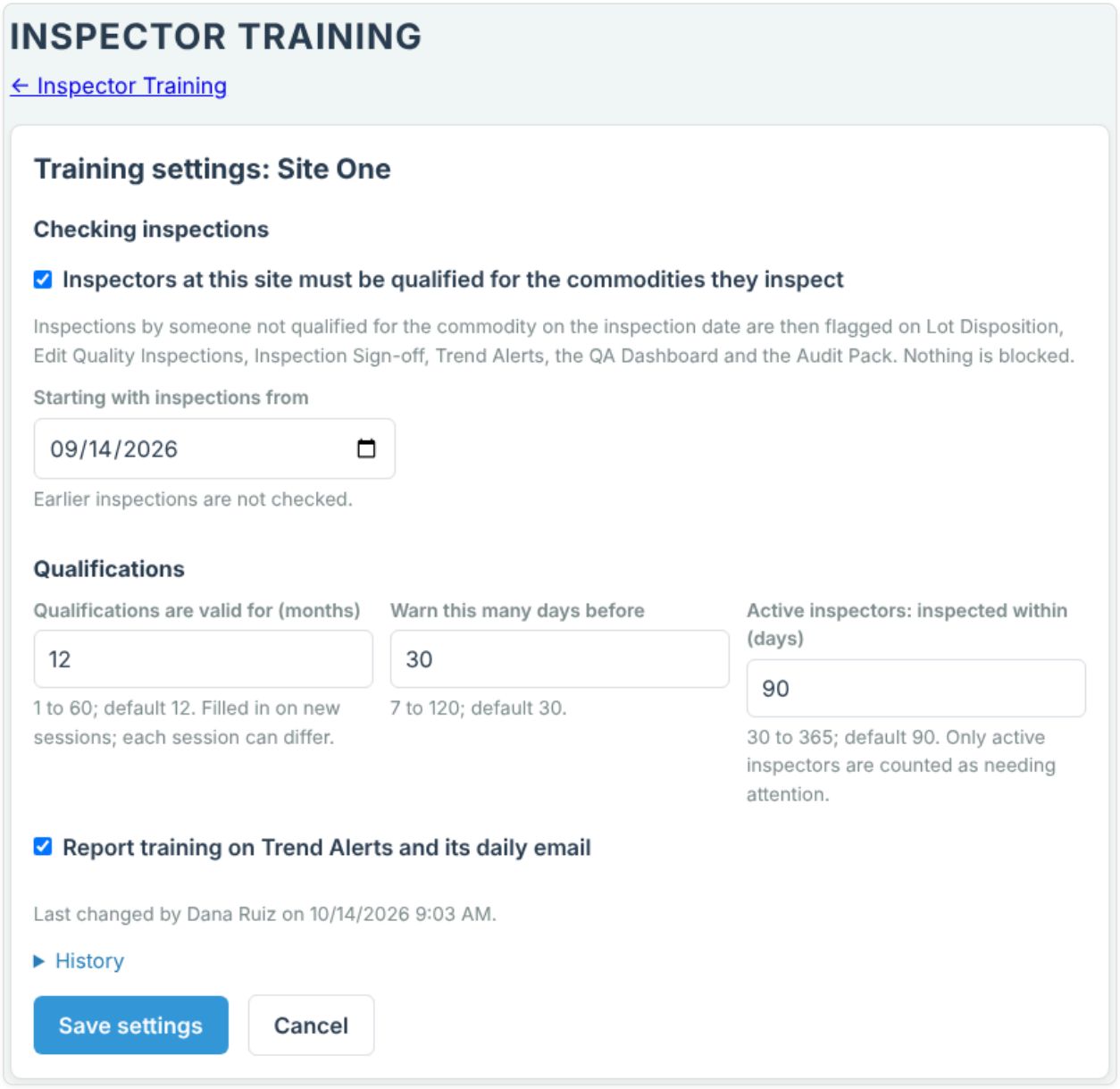
CHANGING OR DELETING A SESSION

- Open the session and select Change to correct its details or who attended, then Save changes. Qualifications follow the change straight away. If someone else changed the session first, the page says so and shows it as it is now.
- Add files adds a sign-in sheet or certificate later, up to 3 per session. A file can be removed by whoever added it, or by a Quality Control Manager.
- Only Quality Control Managers delete a session, with a reason. It stays listed as Deleted, with who deleted it, when and why, but no longer qualifies anyone.
- History, at the bottom of the session, lists every change, with who made it and when.

CHECKING INSPECTIONS AGAINST TRAINING

Training can always be recorded. To have inspections by someone not qualified flagged, a Quality Control Manager turns the check on for the site:

1. Go to Growers > Inspector Training and select Settings.
2. Tick Inspectors at this site must be qualified for the commodities they inspect.
3. In Starting with inspections from, choose the first inspection date to check (today, to start with). Earlier inspections are not checked.
4. If you like, change Qualifications are valid for (months) (1 to 60; 12 by default, filled in on new sessions), Warn this many days before (7 to 120; 30 by default) and Active inspectors: inspected within (days) (30 to 365; 90 by default), and turn Report training on Trend Alerts and its daily email on or off.
5. Select Save settings.



Training settings for a site

From then on, an inspection by someone not qualified for its commodity on the inspection date is flagged. The inspector is the user the inspection was recorded under. Nothing is blocked: inspections are recorded and lots decided as usual, and the mobile apps don't change. Inspections not qualified, at the top of the page, lists them.

> **Note:** Each change to the settings is kept in History, with who made it.

WHERE TRAINING SHOWS

- Lot Disposition (6.7) shows a warning under the inspector of the lot, and in the window where the lot is decided.
- Edit Quality Inspections (6.6) shows it under the inspection, with a See training link.
- Inspection Sign-off (6.16) shows it in the list and on the inspection’s page.
- The QA Dashboard (6.14) counts the inspections by someone not qualified, the inspectors not qualified and the qualifications expiring soon.
- Trend Alerts (6.13) reports inspections by someone not qualified and qualifications expiring with no refresher, and emails them to the site’s Quality Control Managers with the others. To turn them off, clear Report training on Trend Alerts and its daily email in Settings.
- The Audit Pack (6.17) has an Inspector Training section for the auditor.
- An inspector’s page shows their calibration for each commodity, for those with the Inspector Calibration permission (see 6.26).

Date Inspected	Serial / Lot Number	Grower	Product Inspected	Disposition
10/13/2026 Maria Lopez	1779120000 Lot L-20000	Valle Verde Farms	Apples · Gala	On hold Dana Ruiz 10/13/2026 2:10 PM Change
10/13/2026 Sam Carter ⚠ Sam Carter: not qualified for Tomato	1779062400 Lot L-62400	Sunrise Orchards	Tomato · Roma	Accepted Dana Ruiz 10/13/2026 11:25 AM Change
10/12/2026 Maria Lopez	1779163200 Lot L-63200	Cañada Ranch	Tomato · MgrVar2	Accepted Dana Ruiz 10/12/2026 3:40 PM Change
10/11/2026 Sam Carter ⚠ Sam Carter: not qualified for Tomato	1779192000 Lot L-92000	Desert Bloom Growers	Tomato · Roma	Accepted Dana Ruiz 10/11/2026 10:05 AM Change

Training warnings on Lot Disposition



8. Inspector Training

Inspections from 09/14/2026 on are checked: an inspector must be qualified for the commodity on the inspection date. Qualifications are shown as of today; inspectors who inspected in the last 90 days are active.

Training sessions in the period

Date	Topic, trainer and length	Qualifies for	Attended	Files
11/09/2025	Tomato inspection basics Dana Ruiz · 3 h Defects, sizing and color charts.	Tomato · until 11/08/2026	Maria Lopez	—
12/18/2025	Apple grading Valley QA Services · 4 h	Apples · until 12/17/2026	Maria Lopez, Sam Carter (not qualified)	—
04/03/2026	New inspector orientation Dana Ruiz · 8 h	All commodities · until 10/02/2026	Sam Carter	—
10/04/2026	GMP refresher Dana Ruiz · 1.5 h Annual GMP and hygiene refresher.	Training record only	Luis Ortega, Maria Lopez, Sam Carter	—

Inspectors (qualifications today)

Inspector	Last inspection	Commodities inspected (last 90 days)	Qualifications today
Maria Lopez	10/13/2026	Apples, Tomato	Apples: Qualified to 12/17/2026 Tomato: Expiring soon to 11/08/2026
Sam Carter	10/13/2026	Apples, Tomato	All commodities: Expired 10/02/2026 Apples: Expired 10/02/2026 Tomato: Expired 10/02/2026

Inspections by someone not qualified

Inspected	Serial / lot	Grower	Product	Inspector and why
10/03/2026	1779138000 Lot L-38000	Valle Verde Farms	Apples · Fuji	Sam Carter, not qualified for Apples (qualification ended 10/02/2026)
10/07/2026	1779073200 Lot L-73200	Sunrise Orchards	Tomato · Roma	Sam Carter, not qualified for Tomato (qualification ended 10/02/2026)
10/08/2026	1779170400 Lot L-70400	Cañada Ranch	Tomato · MgrVar2	Sam Carter, not qualified for Tomato (qualification ended 10/02/2026)
10/09/2026	1779127200 Lot L-27200	Valle Verde Farms	Apples · Gala	Sam Carter, not qualified for Apples (qualification ended 10/02/2026)
10/11/2026	1779192000 Lot L-92000	Desert Bloom Growers	Tomato · Roma	Sam Carter, not qualified for Tomato (qualification ended 10/02/2026)
10/13/2026	1779062400 Lot L-62400	Sunrise Orchards	Tomato · Roma	Sam Carter, not qualified for Tomato (qualification ended 10/02/2026)

The Inspector Training section of an audit pack

> **Note:** Give Users the Inspector Training permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections); they see it after they next sign in. Quality Control Managers have it already. Users with it record and change sessions and add files; only Quality Control Managers delete sessions and change the settings.

6.19 Grower Action Requests

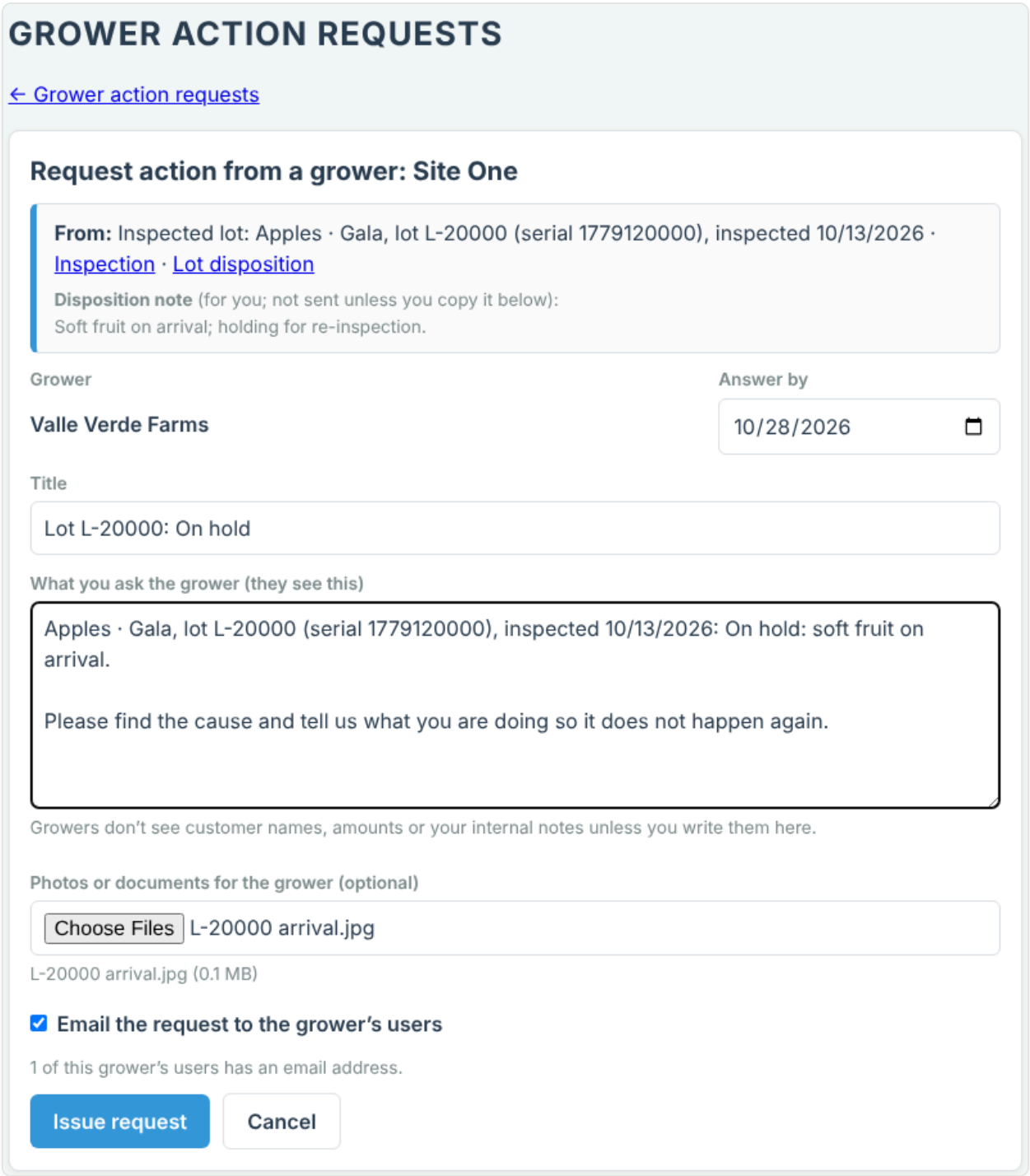
Growers > Grower Action Requests asks a grower to find the cause of a problem and tell you what they are doing about it — a supplier corrective action request, as food safety audits such as PrimusGFS, SQF and BRCGS expect for problems that come from a supplier. The grower's users answer on their own Action Requests page in Continuum QC, and a Quality Control Manager accepts the answer or sends it back.

ISSUING A REQUEST

Start the request from where the problem is, so it is filled in for you:

- A lot: in the Lot Disposition window, select Request action from the grower, or under the inspection on Edit Quality Inspections, Request grower action (see 6.6 and 6.7).
- A customer claim: select Request action from the grower on the claim (see 6.10).
- A certificate: on the grower's page in Grower Certificates, select Ask the grower for a current ... certificate (see 6.15).
- Anything else: select Request action from the grower on the grower's scorecard (6.11), or New request on Growers > Grower Action Requests and choose the Grower.

1. Check the Title and What you ask the grower: the grower sees both.
2. Change Answer by if needed (14 days from today to start with).
3. If you like, add up to 5 photos or PDFs for the grower, such as photos of the lot.
4. Leave Email the request to the grower's users ticked to email it to them, and select Issue request.



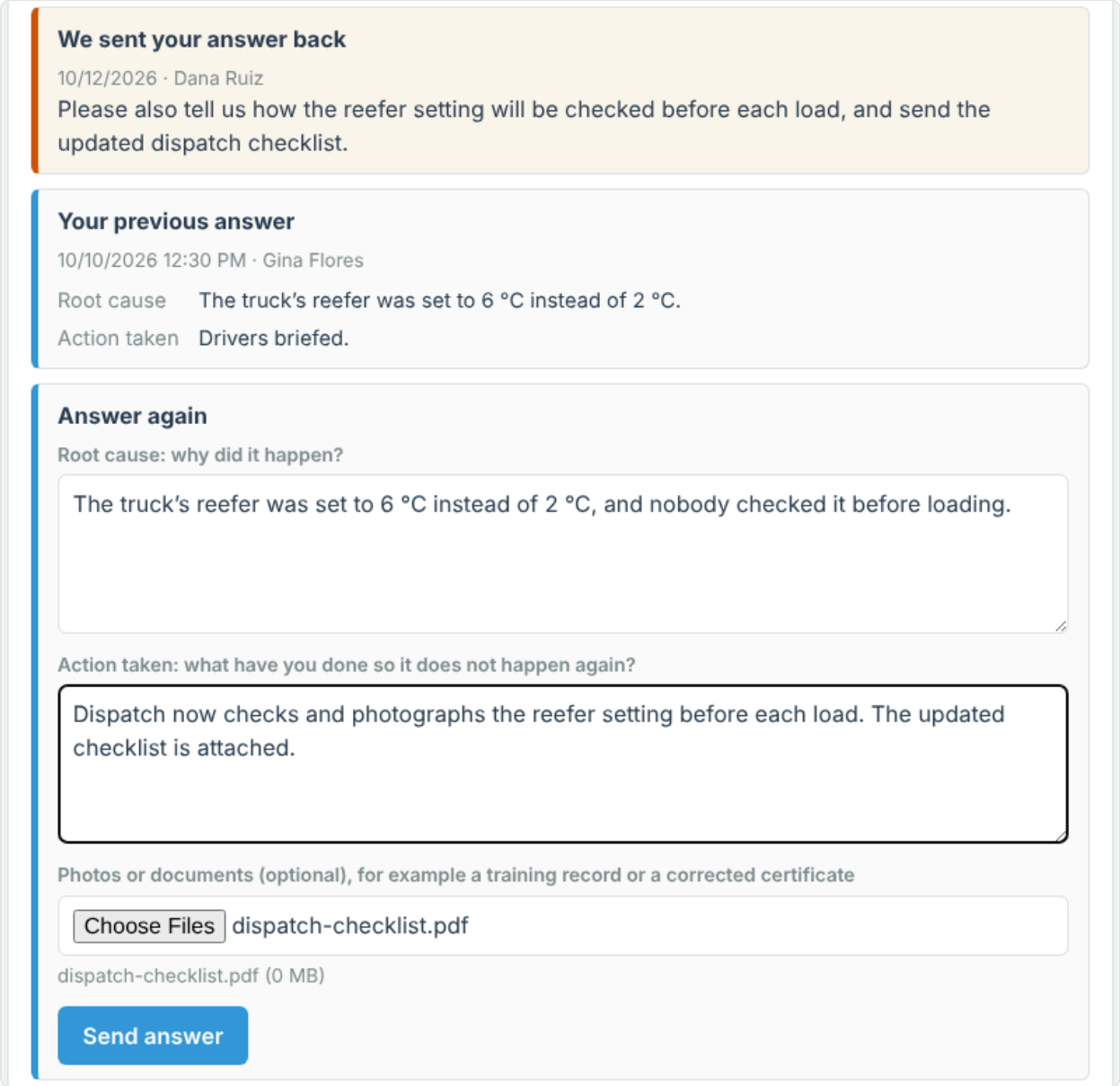
Requesting action from a grower

Note: Customer names, amounts and internal notes are not put in the request. A claim's description and a lot's disposition note are shown above the form, for you: copy into the request what the grower should know.

> **Note:** The request is emailed, in each user's language and from the site's email account, to the grower's users with an email address: set them up on gear > Growers > Add / Change Grower Users and link them on Assign Grower User to Grower (see 3.3). The message after Issue request says how many were emailed, or why none were.

HOW GROWERS ANSWER

Grower users find Action Requests in their QA menu, with the requests sent to their growers. They open one, read what is asked, open the files sent with it and can print the inspection report. They answer with the Root cause (why it happened), the Action taken (what they did so it does not happen again) and up to 5 photos or PDFs, and select Send answer. Whoever issued the request is emailed.



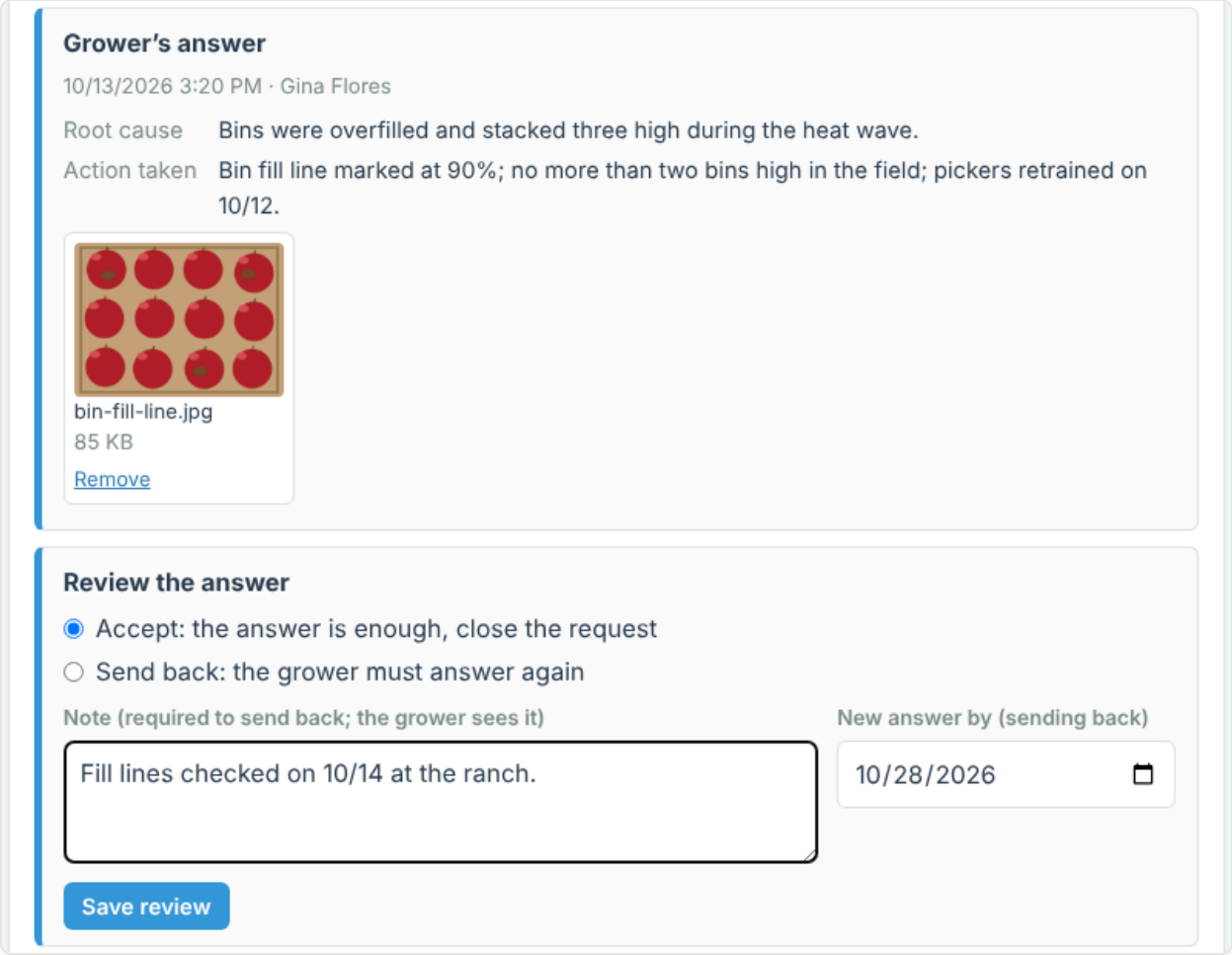
A grower answering a request sent back

For a grower who has no login, record the answer they sent by phone or email: open the request, select Record the grower's answer (received by phone or email), enter the root cause and the action, add what they sent, and select Record answer. It is marked as recorded for the grower.

REVIEWING AN ANSWER

A Quality Control Manager opens the request (Answer to review in the list) and, under Review the answer, chooses:

- Accept: the answer is enough, and the request is closed. A note is optional.
- Send back: the grower must answer again. Write what is still needed — the grower sees it — and choose the new answer-by date. The grower is emailed and can answer again, with room for 5 more files.

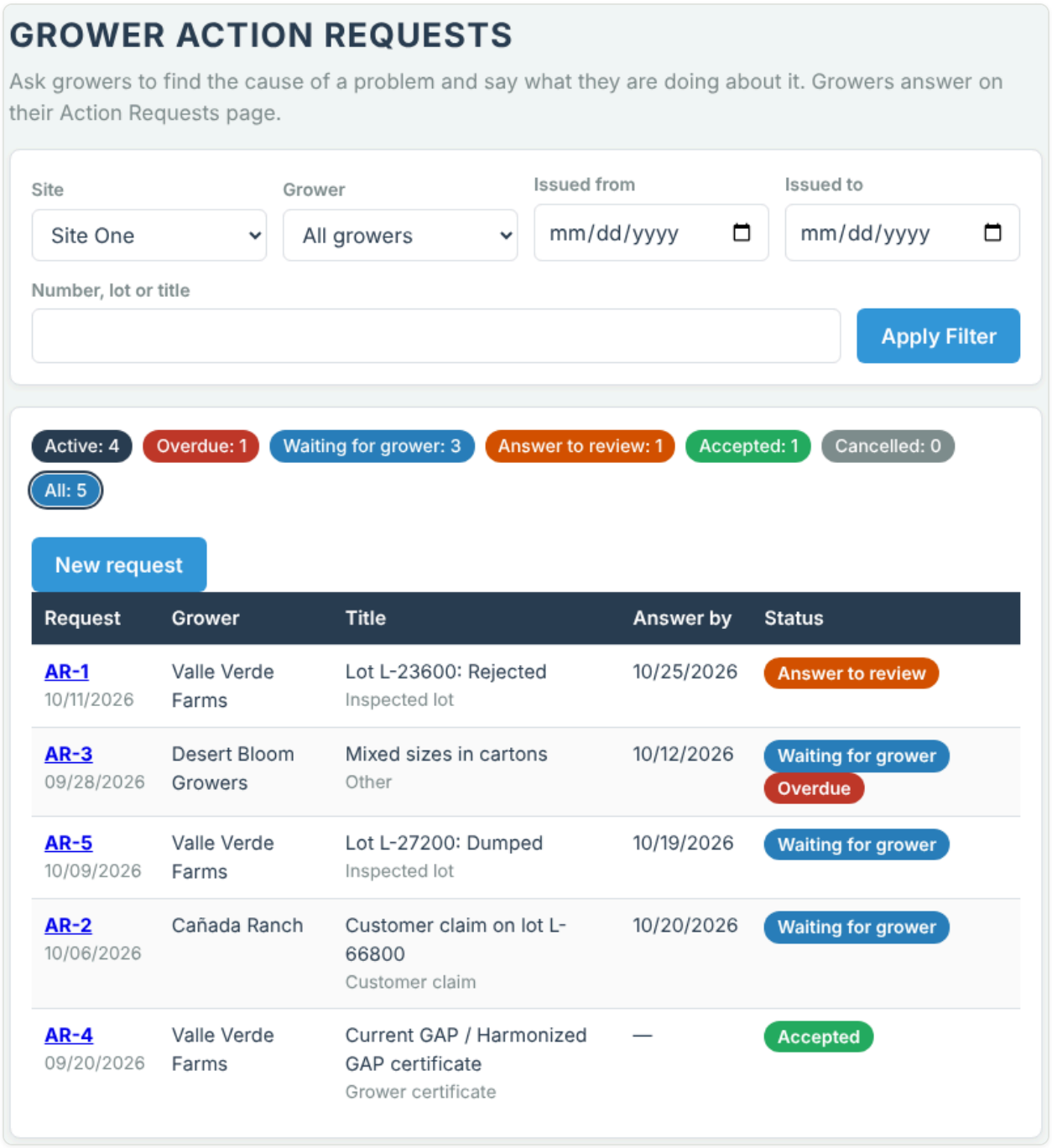


Reviewing a grower's answer

Note: While a request waits for the grower, Change corrects its title, text, due date or whether to email the grower, and Add files for the grower adds files. Quality Control Managers can cancel a request with Cancel request, giving a reason the grower sees. Every step is in the request's History.

FOLLOWING REQUESTS

Growers > Grower Action Requests lists the site's active requests, those with an answer to review first, then by due date. Choose a Grower, the Issued from and Issued to dates, or search for a number, lot or title, and select Apply Filter. Select one of the colored counts to see only those overdue, waiting for the grower, with an answer to review, accepted or cancelled, or all of them.



Grower action requests

Shown as	What it means
Waiting for grower	Issued, or sent back, and waiting for the grower's answer. Overdue is added after the Answer by date.
Answer to review	The grower answered (or QC recorded their answer). A Quality Control Manager accepts it or sends it back.
Accepted	The answer was accepted and the request is closed.
Cancelled	Cancelled by a Quality Control Manager, with the reason.

- Trend Alerts (6.13) reports requests not answered by their due date with the other overdue items, and emails them to the site's Quality Control Managers.
- The QA Dashboard (6.14) counts the requests overdue, waiting for growers and with an answer to review.
- A grower's scorecard (6.11) lists the requests issued to them in the period, Inspection Change History (6.8) shows the steps of requests raised from an inspection, and the Audit Pack (6.17) has a section for them.

> **Note:** Give Users the Grower Action Requests permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections); they see it after they next sign in. Quality Control Managers have it already. Users with it issue requests, change them, record answers and add files; only Quality Control Managers review answers and cancel requests. Every grower user has Action Requests after they next sign in.

6.20 Management Review

Management > Management Review keeps the record of each site's management reviews: meetings, held at planned intervals, where the people responsible look back over a period with its figures, decide whether the quality program is working and what will change, and follow up the actions. Food safety standards such as

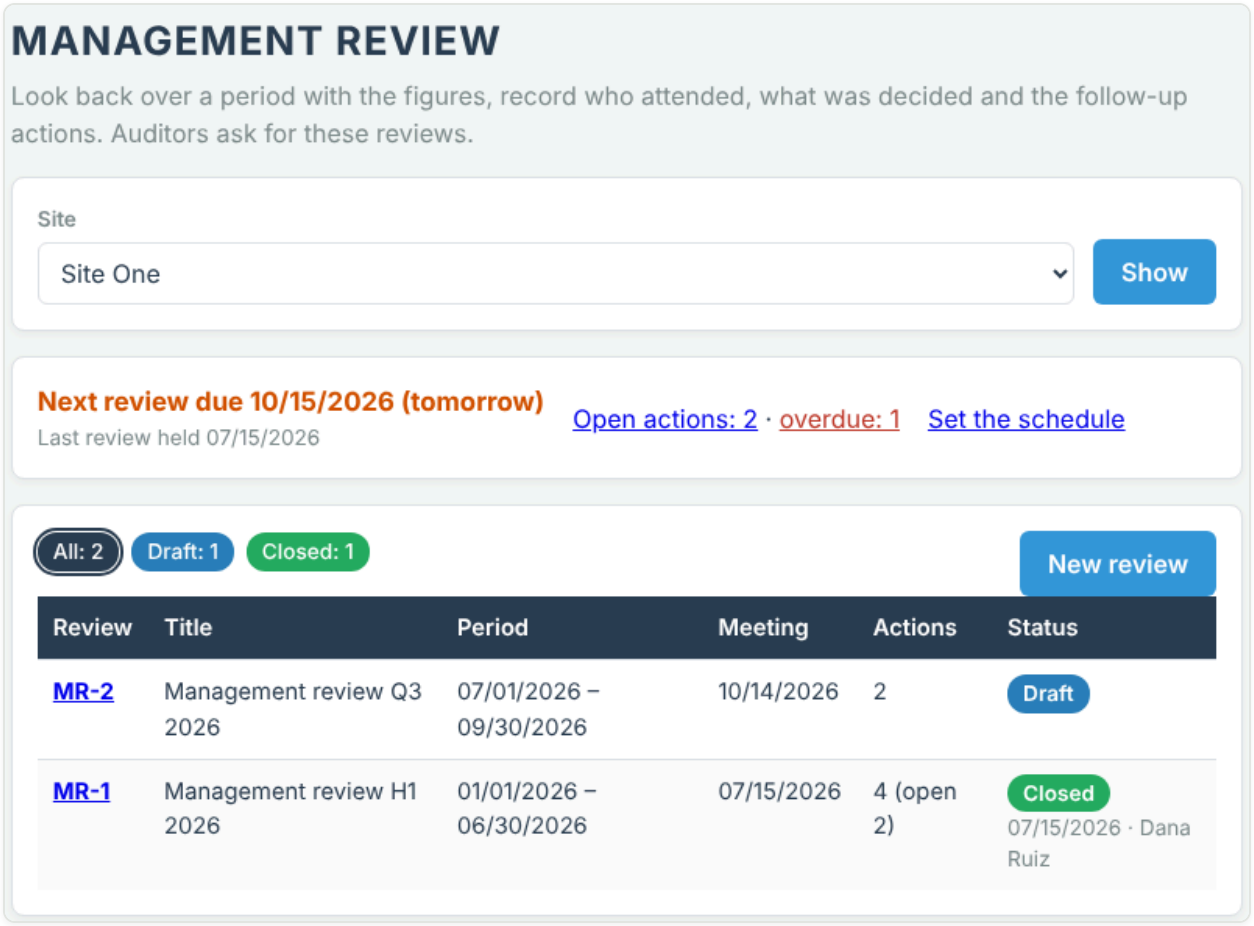
PrimusGFS, SQF and BRCGS ask for these reviews, and auditors ask to see the records.

SCHEDULING REVIEWS

Quality Control Managers set how often each site holds a review. On Management > Management Review, select Set the schedule and fill in:

- Hold a management review every: from 1 to 36 months, or Not scheduled.
- First review due by: when the first review is due. After that, the next is due that many months after the meeting date of the latest closed review.
- Remind this many days before it is due: 30 to start with (7 to 120).

Select Save schedule. The page then shows when the next review is due (orange when it is due soon, red when it is overdue), when the last one was held, and the open and overdue actions.



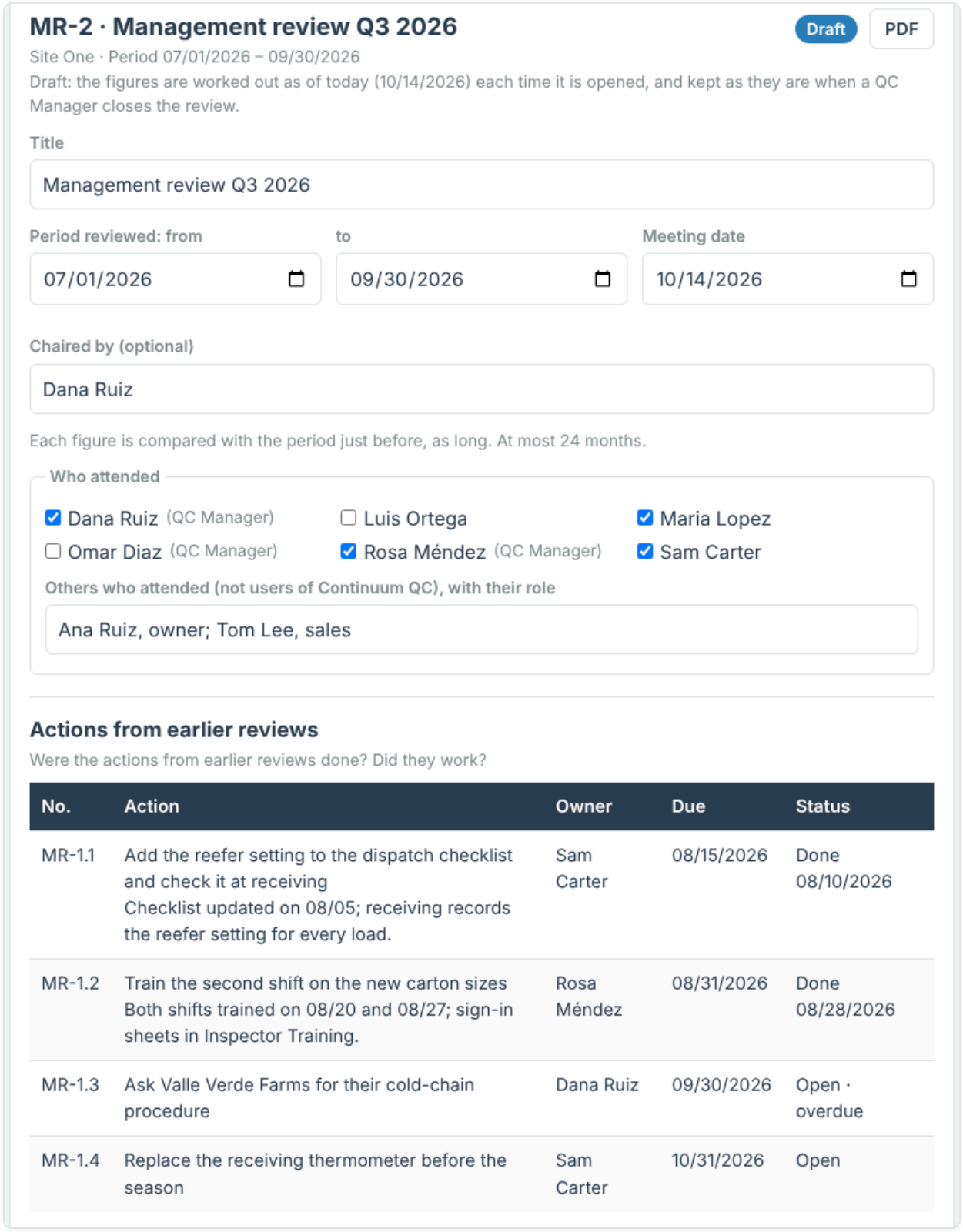
Management reviews

PREPARING A REVIEW

1. On Management > Management Review, select New review (Quality Control Managers with more than one site choose the Site first).
2. Check the Title, the Period reviewed (from and to) and the Meeting date. The period ends at the end of last month and covers as many months as the schedule, or starts where the last review stopped. It can be up to 24 months; each figure is compared with the period just before, as long.
3. Select Start review.

The review starts as a draft. Quality Control Managers and Users with the Management Review permission can change a draft until it is closed: before the meeting to prepare it, and at or after the meeting to record it. Select Save draft to keep your changes.

At the top of the draft, enter who Chaired it, tick Who attended among the site's Quality Control Managers and Users, and type Others who attended, with their role, such as the owner or someone from sales.



A management review being prepared

Below come ten topics, and one more each for quality objectives, mock recalls, internal audits and external audits once they are in use. Each has a hint of what to

discuss, the period’s figures where there are any, and a box for the Discussion and decisions:

Topic	What the page shows
Actions from earlier reviews	The actions of earlier reviews still open, and those finished since the last review, with their owner, due date, status and what was done.
Quality objectives	Each quality objective in force in the period, with its target, year to date and status, and why and what is being done when it is off track; today, the objectives on track and off track, those not explained and the own figures not entered in time (see 6.27). Shown once quality objectives are in use.

Topic	What the page shows
Product quality and lot decisions	Inspections, the average quality and condition scores, and the share of lots put on hold, rejected or dumped, also by commodity; the shelf-life samples kept and the share that reached their target (see 6.23); today, the decisions on the period's lots, the inspection sign-off, and the shelf-life samples in progress and checks overdue. Once sampling plans are in use, the inspections checked against a plan, the share accepted, those rejected and those with too few units or no lot size, against the period before, and the commodities with a plan today (see 6.33). With cold chain in use, the lots checked against their temperature limits, the share out of range, those with no temperature and the storage readings out of range, against the period before, and the limits, places and readings not saying what was done today (see 6.34). With non-conforming product logged, the records, those dumped or destroyed, returned to the grower and released with a concession, against the period before, and those not closed and late today (see 6.35). With control charts in use, the charts with control limits and points, the share with a signal and the signals, against the period before; and today, the charts with limits, those with a signal in the last 7 days, those with points but no limits yet, and the limits set and withdrawn in the period (see 6.37). With lab tests recorded, the tests reported, the share that failed a market's limits and those not checked, against the period before; and today, the tests waiting for results, those overdue and the failed tests not dealt with (see 6.38). With recalls started, the recalls and withdrawals started, the product recovered of them and those closed with something not done, against the period before; and today, the open recalls, the customers to tell and not confirming in time, and those with the regulator or the checks overdue (see 6.39). With environmental monitoring, the swabs taken, the share positive or failed, the routine swabs done of those due and the food-contact pathogen positives, against the period before; and today, the open positives, the swabs to take and those overdue after a positive, and the results waiting and late (see 6.40). With

Topic	What the page shows
	sanitation, the pre-op checks done of those due, the share released with every item passing the first time, the areas released anyway, the cleaning done of the tasks due and the checks and cleaning missed, against the period before; and today, the checks missed or not released, the items failing again and again, and the cleaning to do and to verify (see 6.41). With label checks, the start-up label checks done of the line days due, the checks right the first time, the wrong labels found and the checks late, against the period before; and today, the wrong labels to correct and the start-up checks missed and checks late in the last 14 days (see 6.42). With wash water, the start-up wash water checks done of the point days due, the checks in range the first time, the readings out of range, the checks late and the water changes, against the period before; and today, the readings out of range to correct, the water changes overdue, and the start-up checks missed and checks late in the last 14 days (see 6.43). With load inspections, the loads released without problems of those decided, the loads rejected, those released with problems and the pulp temperatures out of range on loads, against the period before; and today, the loads open and those late (see 6.44). With approved suppliers, the supplier reviews and those that approved with conditions or suspended, against the period before; and today, the suppliers in use, those waiting for approval and those suspended, the needed documents expired or missing and the reviews overdue (see 6.45). With metal detection, the start-up detector checks done of the detector days due, the checks passed the first time, the checks failed, the checks late and the foreign material found by the detectors, against the period before; and today, the failed checks to fix, the start-up checks missed and checks late in the last 14 days, and the foreign material found in the last 30 days (see 6.46). With net weight checks, the checks passed (%), the checks failed and the average give-away, against the period before; and today, the failed checks to deal with and those failed in the last 30 days (see 6.47). With glass and brittle plastics, the area

Topic	What the page shows
	checks on time (%), the items found damaged or missing, the breakages and those with product exposed, against the period before; and today, the area checks overdue, the items damaged or missing, and the breakages not cleared, with those waiting for a Quality Control Manager (see 6.48). With water testing, the water test samples, the results passing (%) and the results failed, against the period before; and today, the tests overdue, the failed results not closed, the water sources not used now and the results late from the lab (see 6.49). With maintenance, the work orders requested and those of them in a food-contact area, the hygiene clearances given late, the work sent back by the clearance and the planned maintenance done on time (%), against the period before; and today, the work orders open (urgent), those waiting for the hygiene clearance (late), the temporary repairs to make permanent (past their date) and the planned maintenance overdue (see 6.50). With visitors and contractors, the visits, those of them entering the production areas, those not allowed into production after a health question and those allowed by a Quality Control Manager despite one, against the period before; and today, those in the building and those not signed out from an earlier day (see 6.51). With employee training, the sessions given, the workers trained (who passed a session), the required training in date at the end of the period and the trainings overdue or not done then, against the period before; and today, the workers overdue, those still to train in time and those with a refresher due soon (see 6.52). With field audits, under grower performance, the field assessments, those not approved or approved with conditions, and the risk answers in them, against the period before; and today, the fields in use and approved for harvest, those harvesting without a valid assessment, those due before their harvest, the approvals ending in season and the fields not approved (see 6.53). With food defense, the security checks done of those due, those missed and those with something not OK, the food defense incidents and those with product possibly affected, against the period

Topic	What the page shows
	before; and today, the incidents open, the checks missed in the last 14 days and where the vulnerability assessment's review stands (see 6.54).
Grower performance	Growers inspected, the growers with the most lots held, rejected or dumped and those with the worst scores, grower certificates, grower action requests, and grower approval (the counts today, and the lots from growers not approved).
Customer claims and feedback	Claims received and per 100 inspections, the amounts claimed and credited, the lots recorded as going to customers and the share sent outside the customer's spec (see 6.24), and the quality certificates issued and the share of lots to customers who need one sent without it (see 6.25); today, the claims still open, and the customers and specs in force; and the claims by reason.
Traceability and mock recalls	Mock recalls started, the share passed, the average time taken and the customers found that weren't in the records, against the period before; today, when the next one is due, the latest result and those in progress; and each exercise of the period with what it showed (see 6.28). Shown once mock recalls are in use.
Internal audits	Internal audits completed, their average score, the findings raised (and how many major) and the share of findings closed on time, against the period before; today, the audit plan (checklists planned and overdue), the findings open and overdue, and the audits in progress; and each audit of the period with its score, findings and summary (see 6.29). Shown once internal audits are in use.

Topic	What the page shows
External audits and certifications	External audits and their outcomes (passed, with conditions, failed), the average score of those with one, the non-conformances raised (and how many critical and major), the share of answers sent to the auditor by the due date and the non-conformances accepted, against the period before; today, the certificates expired and expiring soon, the audits overdue and when the next is due, and the non-conformances not yet sent and with the auditor; and each external audit of the period with its outcome, non-conformances and summary (see 6.30). Shown once external audits are in use.
Corrective actions and alerts	Corrective actions raised and closed, those open and overdue, those raised by source, and the trend alerts of the period.
Equipment and calibration	Calibrations recorded and failed, and the instruments in use, overdue or out of service.
Training and resources	Training sessions and attendances, inspections by someone not qualified, and qualifications expiring soon; the inspector calibration checks held and the share of inspector results out of line, and today the inspectors out of line and the checks overdue (see 6.26).
Changes affecting quality	Controlled document versions published and reviews recorded with no change needed, the documents in use, reviews overdue and read confirmations missing (see 6.22). Once change control is in use, the changes requested (and how many high risk), the decisions, the changes closed after a check found they worked, the checks that found a change didn’t work and the share of change actions done by their due date, against the period before; today, the changes waiting for approval, in progress and in effect to check, and their actions open and overdue; and each change of the period with its risk, actions and where it stands (see 6.31). Otherwise no figures: new customers or commodities, rules and standards, staff or facilities.

Topic	What the page shows
Risks and opportunities	The risks added to the register, reviewed, raised, lowered and retired, against the period before; today, the active risks and those with a further action, those very high and high with their controls, and the reviews overdue and due soon; and the risks high or very high with their controls (see 6.36). Shown once the risk register is in use.
Opportunities for improvement	No figures: what could be done better.
Conclusions and decisions	Whether the QC program is working and what will change. Needed to close the review.



Product quality and lot decisions

Trends in scores and in lots held or rejected; commodities of concern.

Measure	This period 07/01/2026 – 09/30/2026	Previous period 04/01/2026 – 06/30/2026
Inspections	**28**	1
Average quality score (1 Excellent – 5 Poor)	**1.7 · Very Good**	5.0 · Poor
Average condition score	**1.9 · Very Good**	5.0 · Poor
Lots put on hold, rejected or dumped (of those with a decision)	**3.7% (1 of 27)**	100.0% (1 of 1)

TODAY

Decisions on this period's lots	Accepted 26 · Accepted with conditions 0 · On hold 1 · Rejected 0 · Dumped 0 · No decision 1
Inspection sign-off	No inspections in this period since sign-off started (10/04/2026).

By commodity (most inspected first)

Commodity	Inspections	Before	Quality	Before	Held, rejected or dumped	Before
Tomato	18	1	1.6 · Very Good	5.0 · Poor	0.0%	100.0%
Apples	10	0	2.0 · Very Good	—	10.0%	—

Discussion and decisions

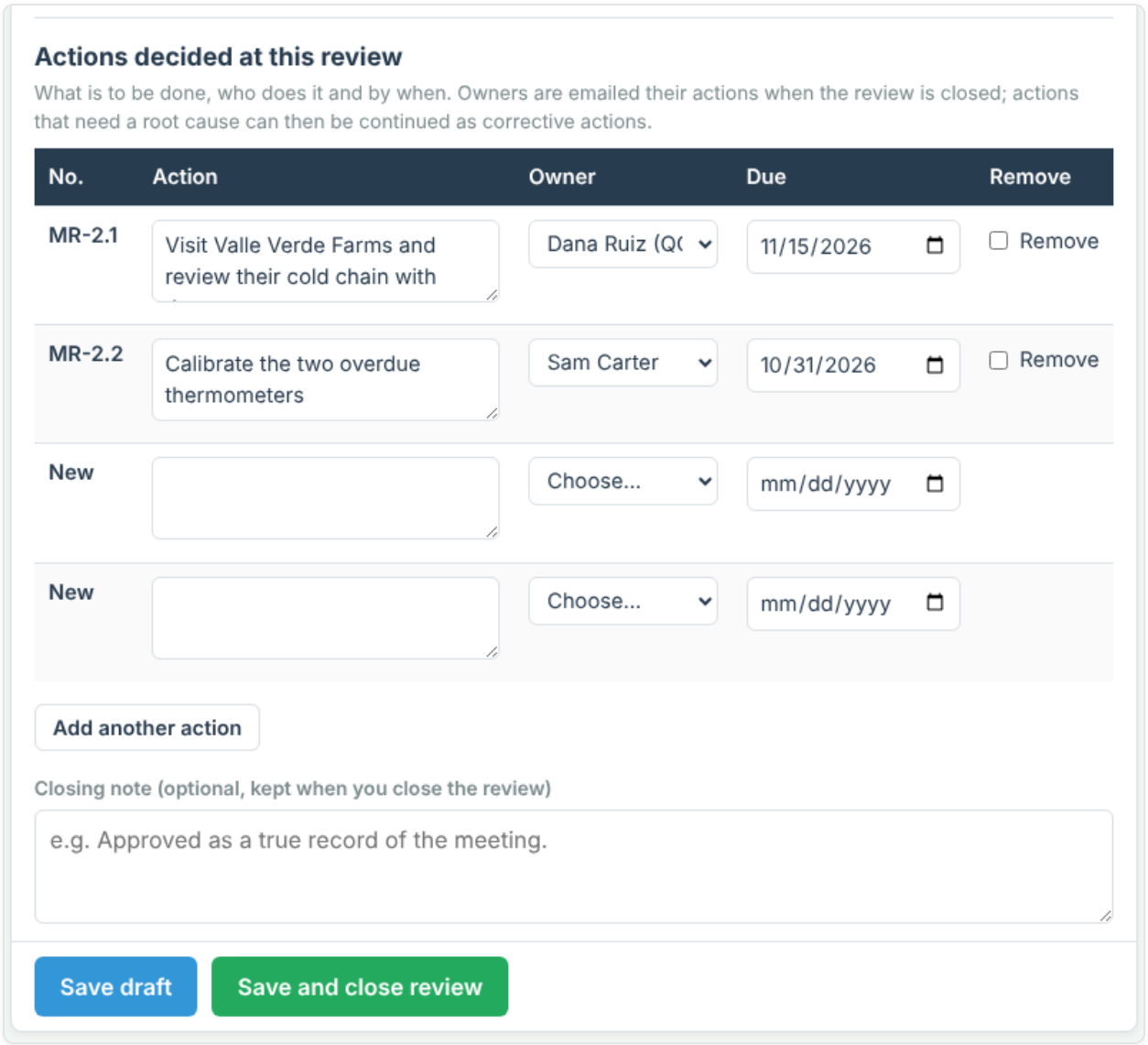
Held, rejected or dumped lots fell to 3.7% of those decided. Apples (Valle Verde) account for the only hold.

A topic with its figures

Note: In a draft, the figures are worked out again each time it is opened, as of today. Figures that are "now", such as claims still open or instruments overdue, are shown under Today. Each part shows only to those who can open the page behind it, such as Customer Claims for the claims; Quality Control Managers see them all.

ACTIONS DECIDED AT A REVIEW

Under Actions decided at this review, enter each thing to be done, choose the Owner (the site's Quality Control Managers and Users with the Management Review permission) and the Due date. Select Add another action for more rows, and tick Remove to take one out. Actions are numbered after the review, such as MR-2.1.



Actions decided at a review

CLOSING A REVIEW

After the meeting, a Quality Control Manager checks the draft, writes What was concluded and decided under Conclusions and decisions, adds a Closing note if

wanted, and selects Save and close review. A review can be closed once the meeting date has come, with who attended and the conclusions entered. Then:

- Its figures, and the actions from earlier reviews, are kept with it as they were that day, and the review no longer changes.
- Each owner is emailed their actions, in their language, from the site's email account; nobody is emailed about their own.
- The next review is due the scheduled number of months after the meeting date.

> **Tip:** Under Files, add up to 5 photos or PDFs, such as the signed minutes, a sign-in sheet or the presentation. Select PDF at the top of a review for a copy to print or keep; a draft says DRAFT at the foot of each page.

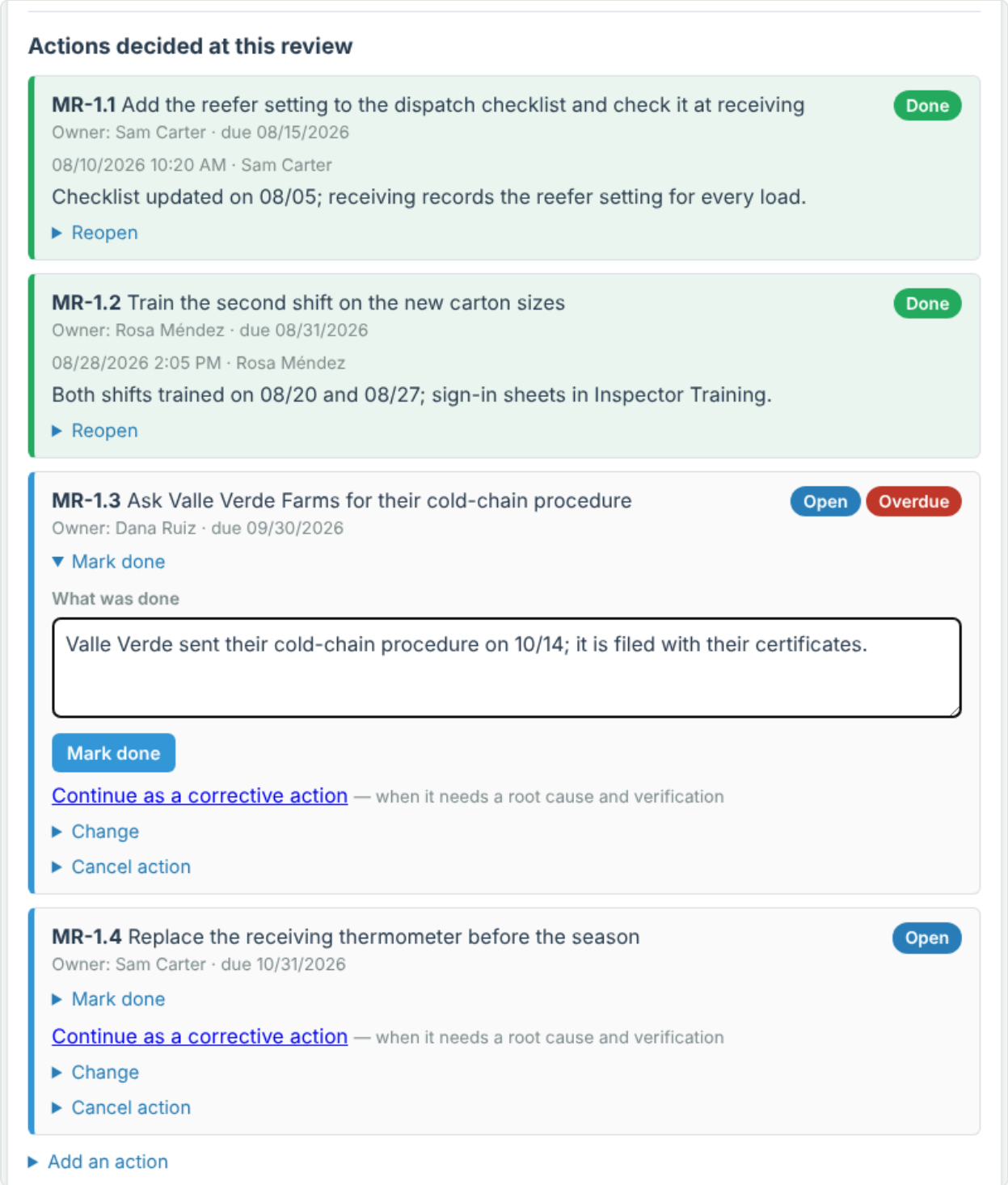
> **Note:** Quality Control Managers can delete a draft with Delete this draft, giving the reason. It stays in the list, marked Deleted, with its history.

FOLLOWING UP ACTIONS

Open a closed review, or select Open actions on the list to see all of the site's review actions (tick Only mine for your own). Under an open action:

- Mark done: the owner or a Quality Control Manager writes What was done and selects Mark done.
- Continue as a corrective action: when the action needs a root cause and a check that it worked. The corrective action form opens filled in from the action, with the source Management review (see 6.9). The review then shows the corrective action and its status, and it is followed up there.
- Change and Cancel action: Quality Control Managers correct the action, its owner or its due date (a new owner is emailed), or cancel it with a reason. Reopen puts back an action marked done or cancelled by mistake, or one whose corrective action was cancelled.

Quality Control Managers can also Add an action that was decided at the meeting but left out; its owner is emailed.



Following up a review's actions

- The next review lists, under Actions from earlier reviews, the actions still open and those finished since the last review.
- Trend Alerts (6.13) warns when the next review is due soon or overdue and when a review action is past its due date, and emails the site's Quality Control

Managers.

- The QA Dashboard (6.14) shows when the next review is due, the drafts in progress and the open and overdue actions, and the Audit Pack (6.17) has a section for the reviews.

> **Note:** Give Users the Management Review permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections); they see it after they next sign in. Quality Control Managers have it already. Users with it prepare drafts, add files, own actions and mark their own actions done; only Quality Control Managers set the schedule, close reviews, delete drafts, and change, cancel, reopen or add actions once a review is closed. Every step is in the History at the bottom of the page.

6.21 Approved Growers

Growers > Approved Growers keeps each site's approved supplier list: the growers a Quality Control Manager has approved to supply the site, what each decision is based on, and when each approval is to be reviewed again. Food safety standards such as PrimusGFS, SQF and BRCGS expect growers to be approved before their product is received and the approvals to be reviewed, and auditors ask to see the list. Every grower starts as Not reviewed, and nothing is decided automatically.

THE APPROVED GROWER LIST

Go to Growers > Approved Growers. Quality Control Managers with more than one site choose the Site and select Apply Filter. The list shows the site's growers that have a decision, and its active growers (inspected within the last 365 days, to start with): each one's approval and since when, when it is to be reviewed again, when it was last inspected, and what may need another look.

APPROVED GROWERS

The growers approved to supply each site, with what each decision is based on and when it is to be reviewed again.

Site: Site One | Grower: Name or part of it | Show: Active or with a deci | Apply Filter

All: 4 | Approved: 1 | Conditional: 1 | Suspended: 1 | Not approved: 0 | Not reviewed: 1 | Review due: 2 | To look at: 4

Print | Settings

Approvals are reviewed every 12 months. Active growers: inspected within 365 days.

Grower	Approval	Review due	Last inspected	To look at
Cañada Ranch	Not reviewed	—	10/12/2026	Required certificate not current: PrimusGFS 3 trend alerts
Desert Bloom Growers	Conditional since 08/30/2026 Send the PrimusGFS audit report by 10/31.	10/11/2026 3 days overdue	10/11/2026	Review overdue Required certificate not current: GAP / Harmonized GAP, PrimusGFS 1 action request overdue 1 trend alert
Sunrise Orchards	Approved since 10/21/2025	10/20/2026 in 6 days	10/13/2026	Review due soon 2 trend alerts
Valle Verde Farms	Suspended since 10/06/2026	—	10/13/2026	4 lots inspected since suspended Required certificate not current: GAP / Harmonized GAP 2 trend alerts

Approved growers

Approval	What it means
Not reviewed	No decision yet. Every grower starts here; its lots get no warning.
Approved	Product from this grower can be received. To be reviewed again by its review date.
Conditional	Approved, with conditions the grower must meet, shown on the list. To be reviewed again by its review date, often sooner.
Suspended	Don’t receive product from this grower until the suspension is lifted. Its lots get a warning.
Not approved	The grower is not approved as a supplier. Its lots get a warning.

Select one of the colored counts to see only those growers: Review due lists the reviews due soon or overdue, and To look at the growers with something to look at. Type part of a name under Grower to find one, or choose Every grower on the site’s list under Show to include growers not inspected lately. Select Print for a copy of the list.

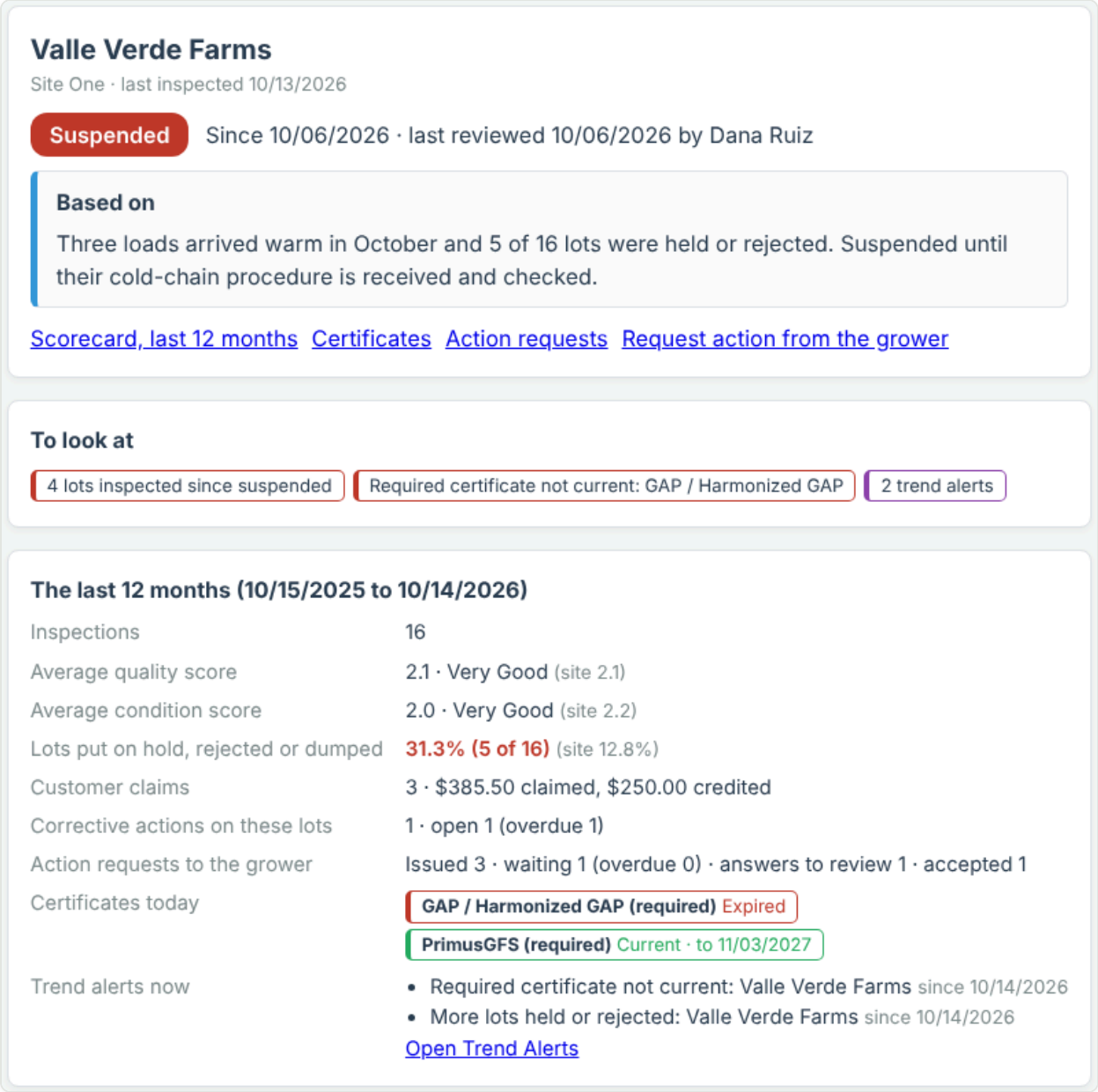
To look at flags:

- A review due soon or overdue (active growers).
- Lots inspected since the grower was suspended or not approved.
- A required certificate not current (see 6.15), action requests overdue (see 6.19) and trend alerts about the grower (see 6.13). Each shows only to those who can open the page behind it.

A GROWER’S APPROVAL

Select a grower’s name. Its page shows the approval with since when, who decided last and what it was based on (and the conditions, for a conditional approval); links to the grower’s scorecard, certificates and action requests; what to look at; and the last 12 months to base a decision on: the inspections and the average quality and condition scores against the site’s, the lots put on hold, rejected or dumped, customer claims and corrective actions on the grower’s lots,

action requests to the grower, certificates today and trend alerts about the grower. Each part shows only to those who can open the page behind it.



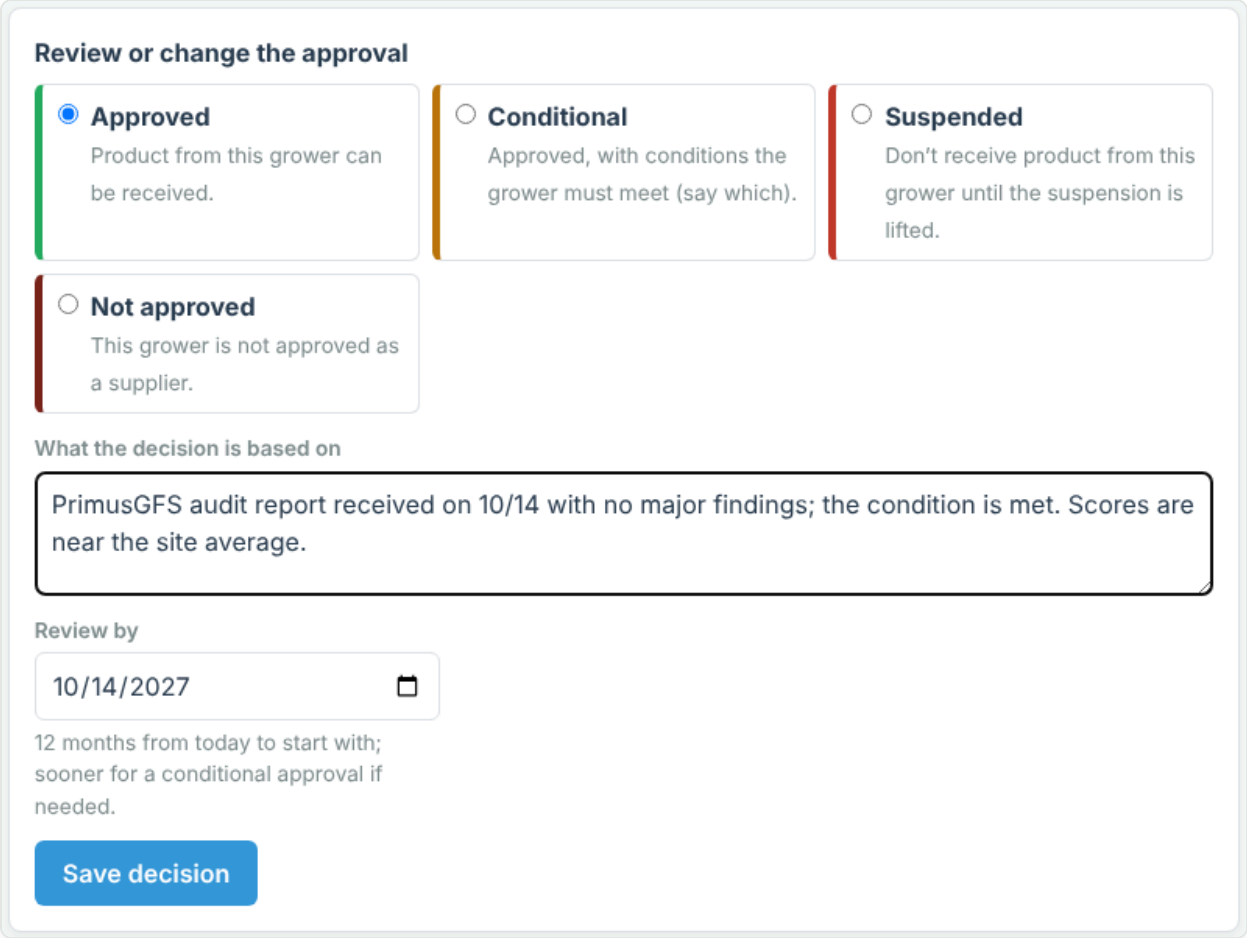
A suspended grower

RECORDING A DECISION

A Quality Control Manager records the decision on the grower's page, under Record a decision (or Review or change the approval):

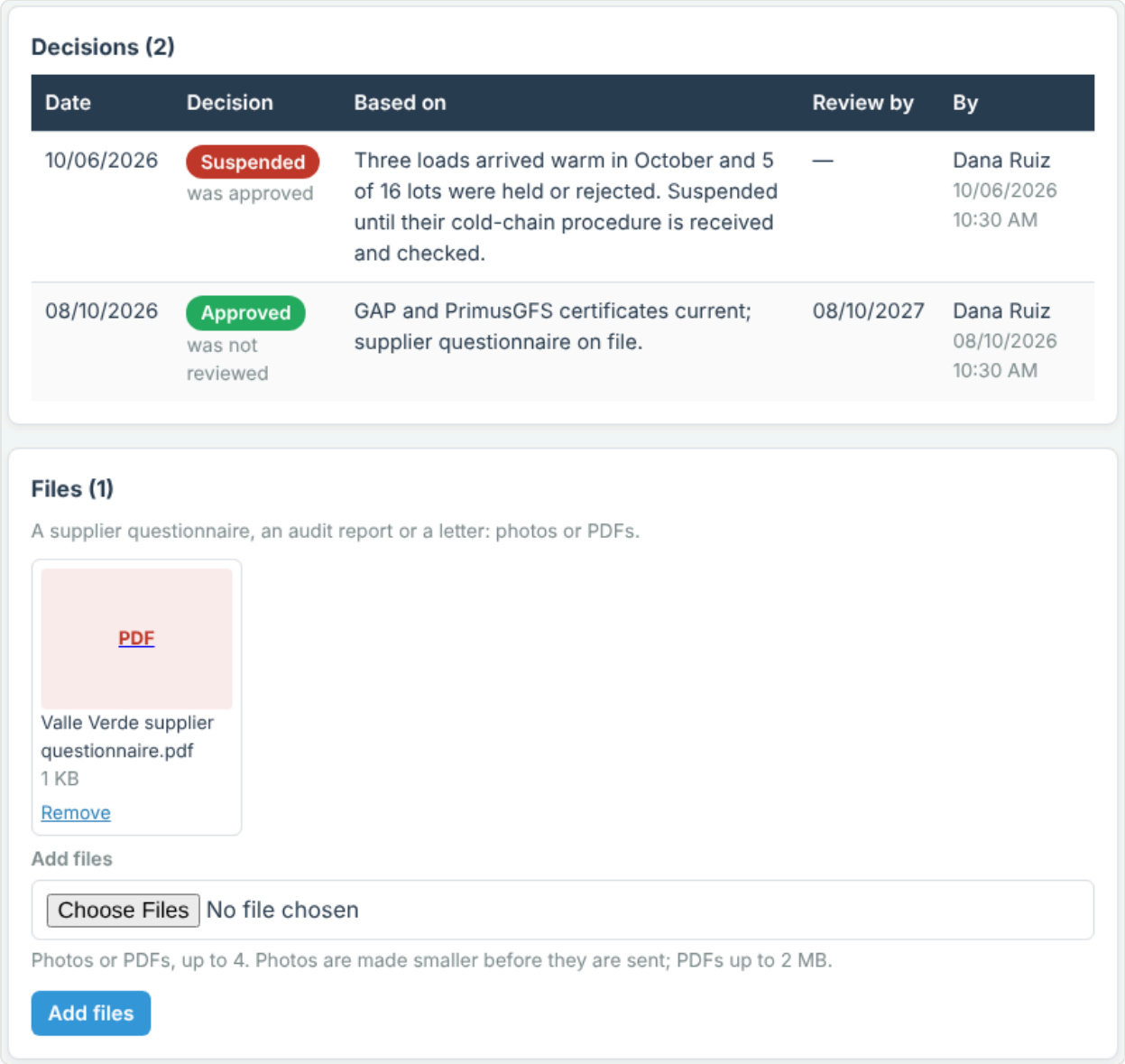
1. Choose Approved, Conditional, Suspended or Not approved.

2. Under What the decision is based on, say why: for example the certificates checked, the scores, a visit or an audit.
3. For Conditional, enter the Conditions the grower must meet.
4. For Approved or Conditional, check Review by: 12 months ahead to start with; choose an earlier date for a conditional approval if needed.
5. Select Save decision.



Reviewing a conditional approval

To review an approval that stays as it is, record the same decision again with a new review date; the list then shows when it was last reviewed. Every decision is kept under Decisions, with who made it and when; decisions are never changed or deleted.



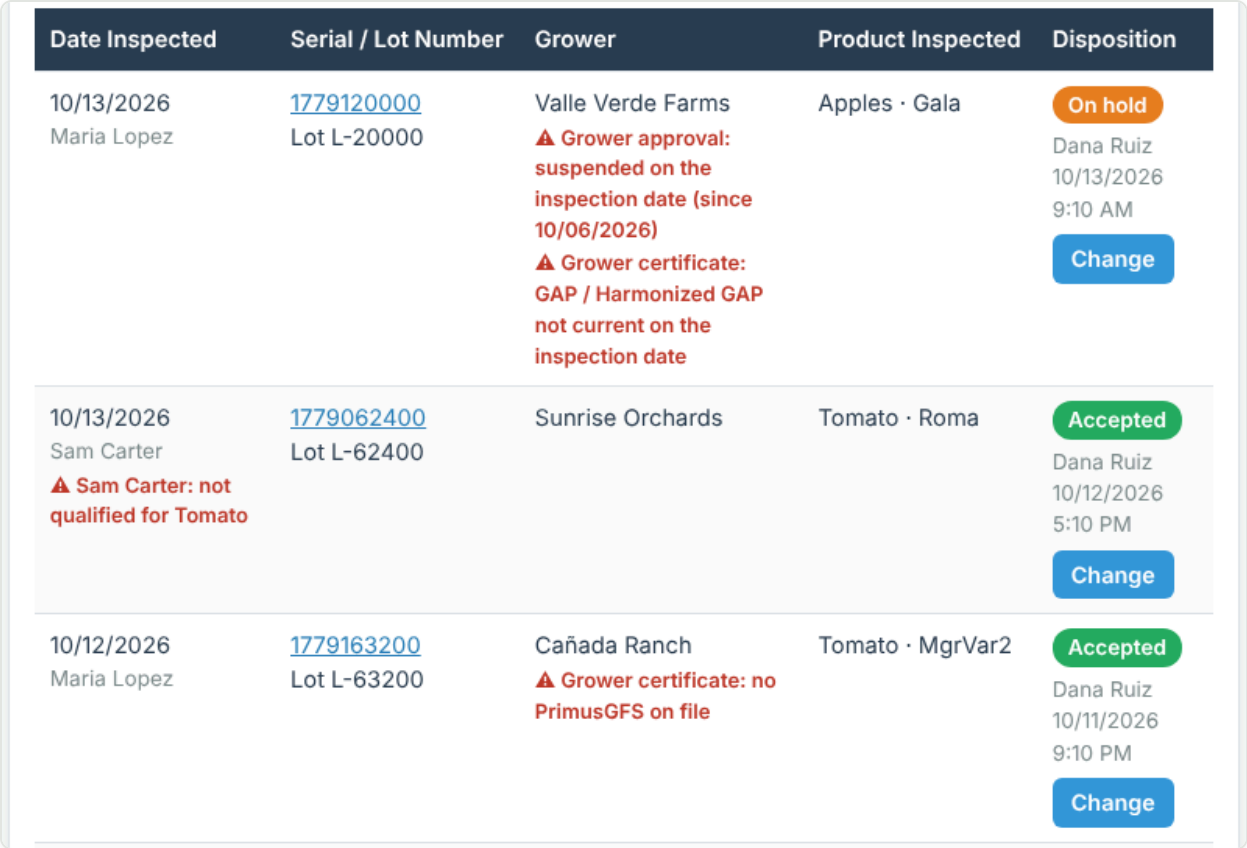
A grower's decisions and files

Tip: Under Files, add up to 5 photos or PDFs that the approval is based on, such as a supplier questionnaire, an audit report or a letter.

Note: When two managers decide about the same grower at once, the second is told that someone decided first and sees that decision.

LOTS FROM GROWERS NOT APPROVED

Nothing is blocked: inspections and lot decisions go on as usual. A lot from a grower who was suspended or not approved on the inspection date gets a warning on Lot Disposition (6.7), in the window where you decide and under the inspection on Edit Quality Inspections (6.6). A lot inspected before the grower was suspended says so ("since ..., after this inspection").



A lot from a suspended grower on Lot Disposition

- Trend Alerts (6.13) reports an active grower's approval due for review or overdue, and the lots of the last 14 days from growers suspended or not approved, and emails them to the site's Quality Control Managers.
- The QA Dashboard (6.14) counts those lots, the growers suspended or not approved, the reviews overdue and due soon, and the active growers not reviewed.
- The grower's scorecard (6.11) and certificates page (6.15) show its approval, the Audit Pack (6.17) has a section with the approved grower list, and a management review (6.20) shows the counts.

SETTINGS

Quality Control Managers select Settings on the list to set, for each site:

- Review every (months): how long an approval lasts before it is due for review (12 to start with, 1 to 36).
- Remind this many days before: when Trend Alerts and the dashboard start warning (30; 7 to 120).
- Active growers: inspected within (days): only these count as not reviewed or due for review (365; 30 to 730).
- Whether approvals due for review, and lots from growers not approved, are reported on Trend Alerts and its daily email.

Select Save settings. A new review period applies to the decisions recorded after it; review dates already set stay as they are.

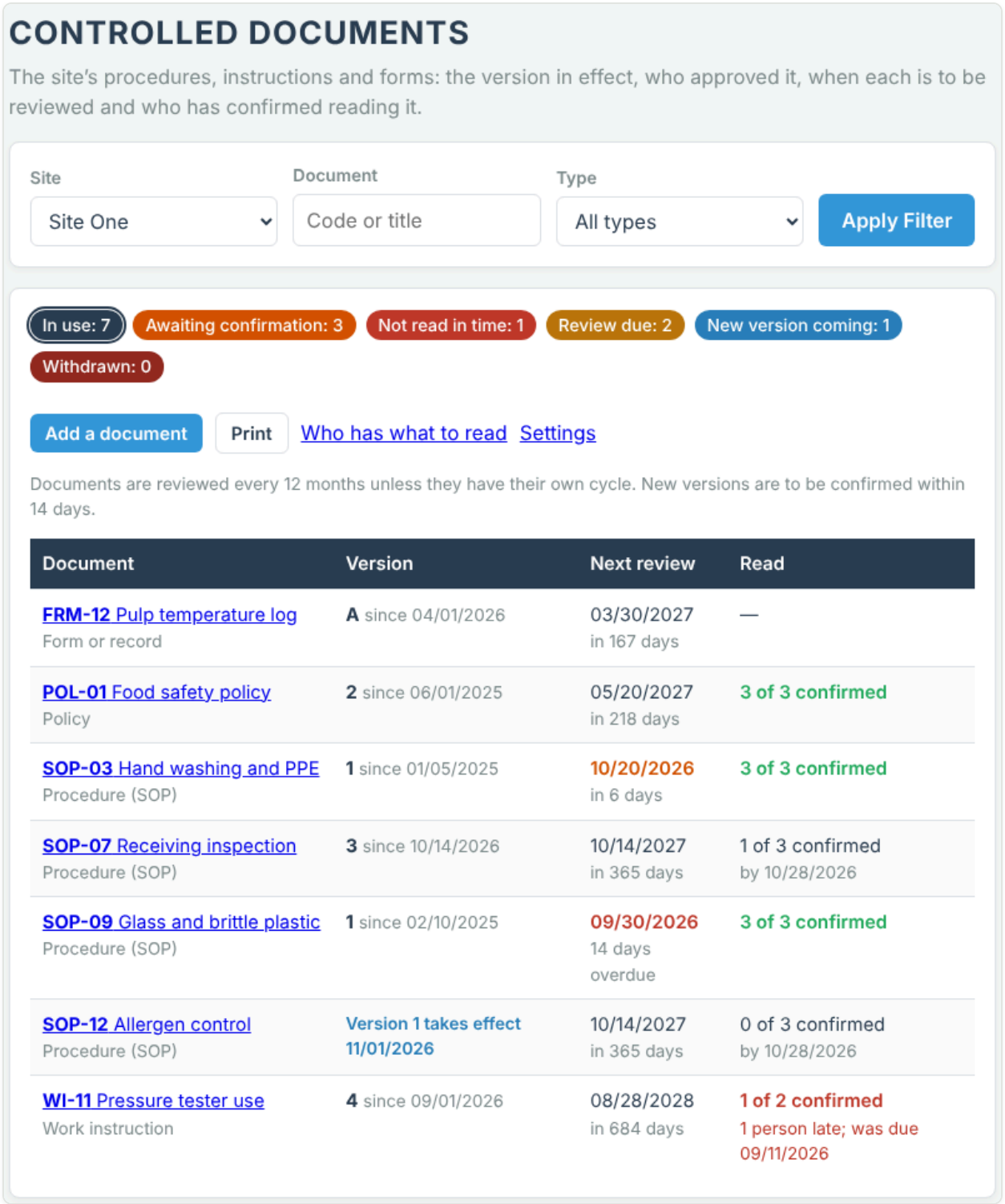
> **Note:** Give Users the Approved Growers permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections); they see it after they next sign in. Quality Control Managers have it already. Users with it see the list and the growers' pages and add files (and remove their own); only Quality Control Managers record decisions, change the settings and remove other people's files. Every step is in the History at the bottom of the grower's page.

6.22 Controlled Documents

Management > Controlled Documents keeps each site's controlled documents — procedures (SOPs), work instructions, forms and policies — with every version, who approved it and when, when each takes effect, when each is to be reviewed, and who has read it. Food safety standards such as PrimusGFS, SQF and BRCGS expect documents to be approved before use and reviewed regularly, old versions to be kept out of use, and the people who use them to be told about changes; auditors ask to see this.

THE DOCUMENT LIST

Go to Management > Controlled Documents. Quality Control Managers with more than one site choose the Site and select Apply Filter. The list shows each document in use: its code, title and type, the version in effect and since when (or a version about to take effect), when it is next to be reviewed, and how many of the people who must read it have confirmed the newest version.



Controlled documents of a site

Select one of the colored counts to see only those documents: Awaiting confirmation, Not read in time, Review due, New version coming or Withdrawn. Type part of a code or title under Document, or choose a Type, and select Apply Filter. Select Print for a copy of the list.

ADDING A DOCUMENT

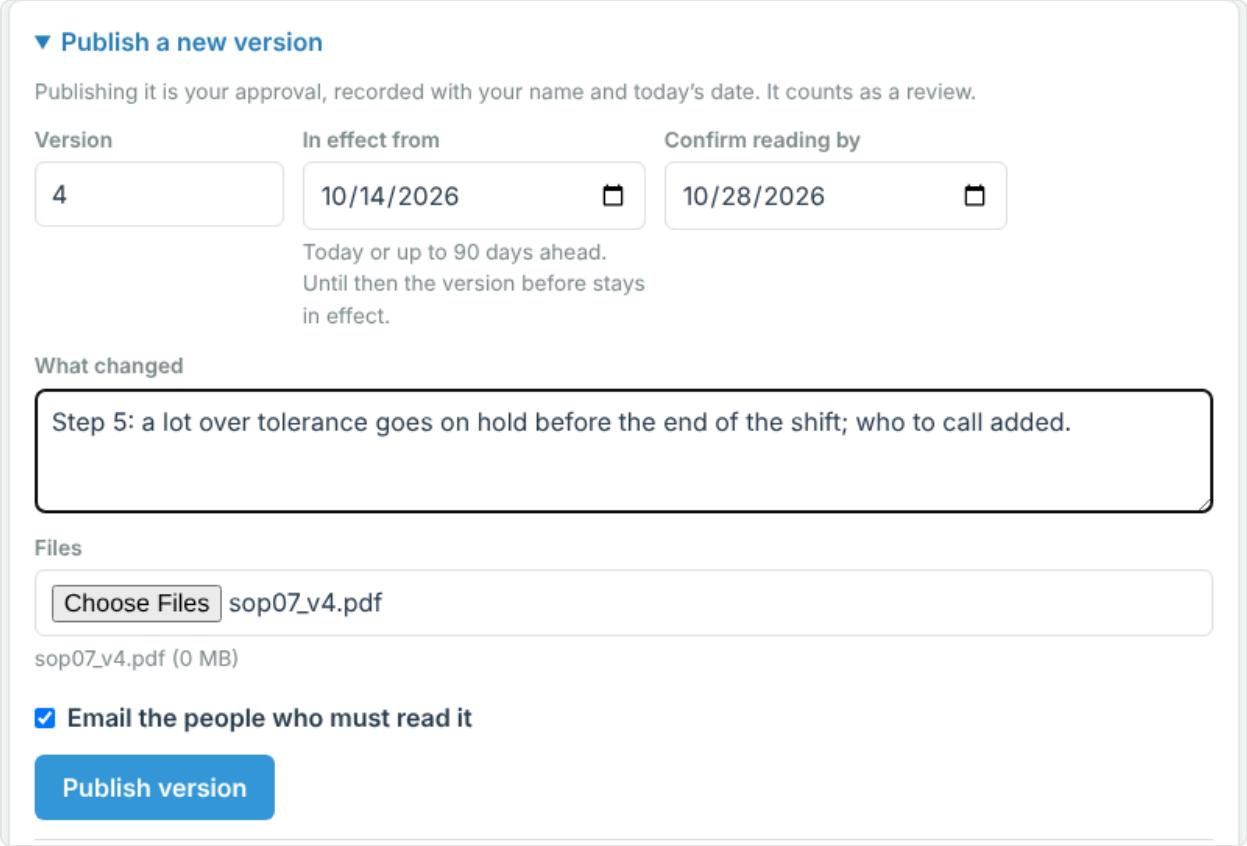
A Quality Control Manager selects Add a document:

1. Enter the Code (unique at the site, for example SOP-07), the Title and the Type.
2. Leave Review every (months) empty to use the site's setting (12 months to start with), or enter the document's own.
3. Under Who must read it and confirm each new version, choose Everyone at the site (every User of the site with the Controlled Documents permission), Chosen people (tick them), or Nobody (for example a blank form).
4. Under First version, enter the Version as you number it (1, A or 2.1), In effect from (an earlier date for a document already in use), What changed (First issue, to start with) and Confirm reading by (14 days ahead to start with).
5. Choose 1 to 3 Files: the document (PDF, Word or Excel) and, for example, an editable copy or a photo.
6. Leave Email the people who must read it ticked to email them, then select Publish the document.

Publishing a version is your approval of it: the document's page shows it as Published and approved by you, with the date.

PUBLISHING A NEW VERSION

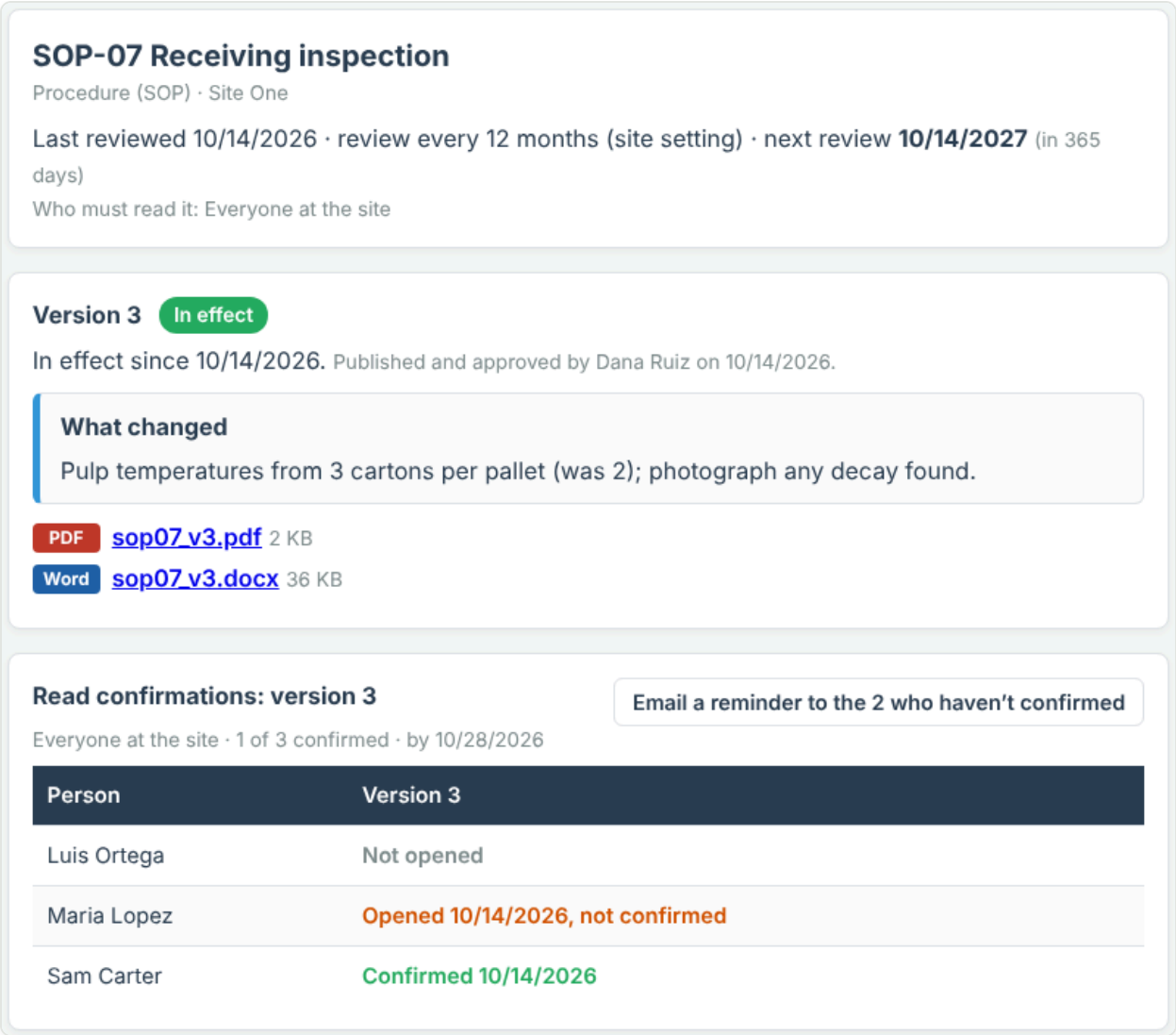
Open the document and select Publish a new version. The next number is offered. Enter what changed, In effect from (today, or up to 90 days ahead; until then the version before stays in effect) and the confirm-by date, choose the files and select Publish version. A new version counts as a review.



Publishing a new version

> **Note:** While a version is still to take effect, no other can be published. If it needs changing, withdraw it first (see Other Changes, below).

The document's page shows the version in effect and one about to take effect, each with what changed, who approved it and its files. Under Read confirmations, Quality Control Managers see who has confirmed reading the newest version, who opened the file but hasn't confirmed, who hasn't opened it, and who is late; Email a reminder emails those who haven't confirmed. Under Versions they see every version, including old and withdrawn ones, with who confirmed each.

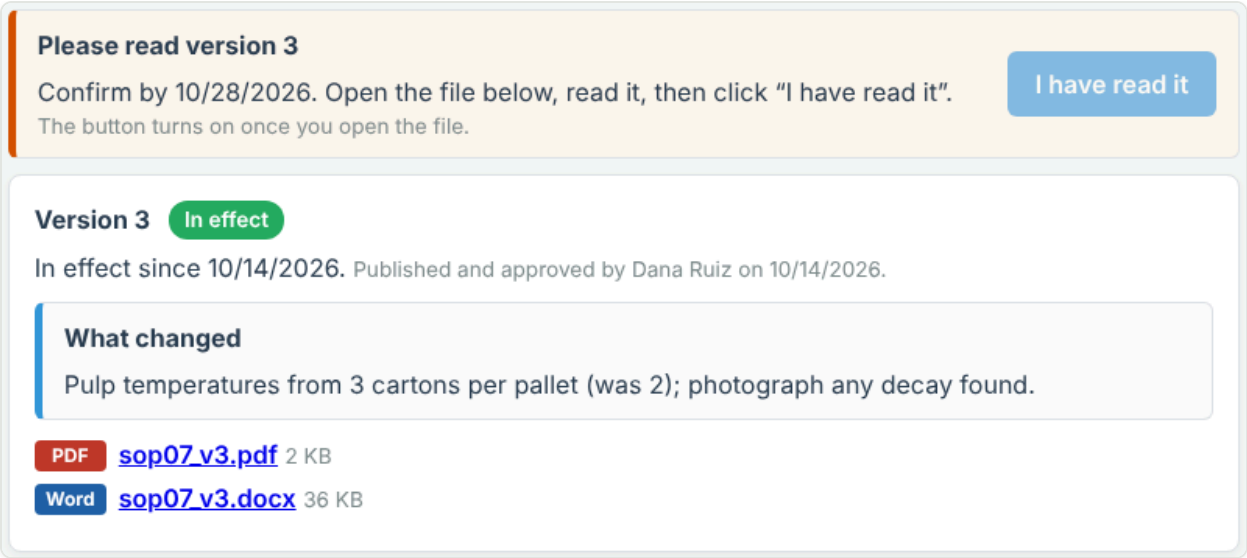


A document and who has read it

READING AND CONFIRMING

The people who must read a document get an email when a version is published (if they have an email address and Email the people who must read it was ticked). They also see it under For you to read on the list and on the QA Dashboard (6.14). To confirm:

1. Go to Management > Controlled Documents and select the document.
2. Open its file (Word and Excel files download) and read it.
3. Select I have read it. The button turns on once the file has been opened.

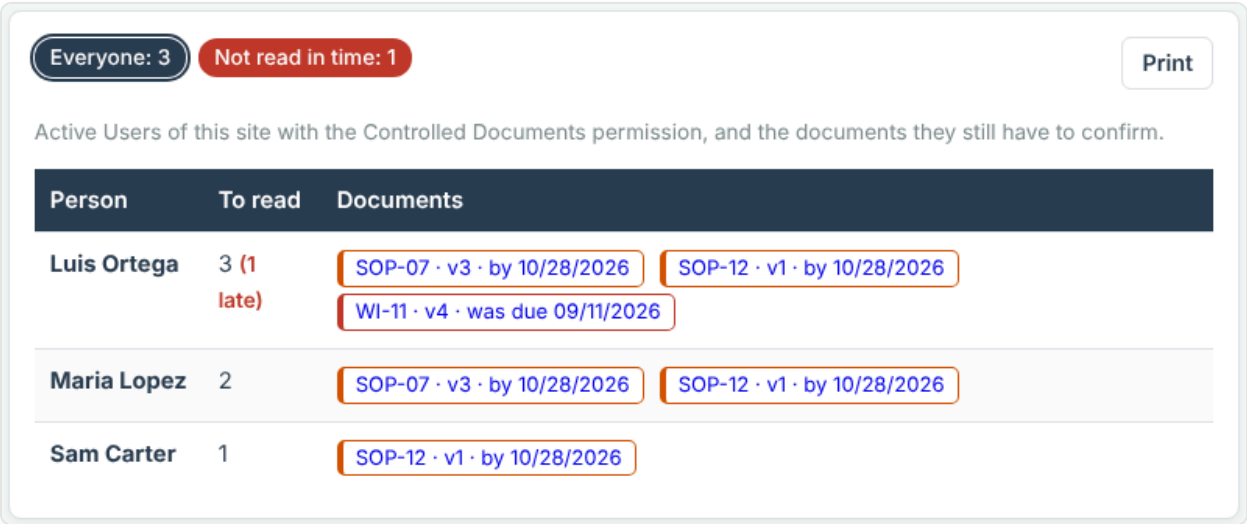


Asked to read a new version

Users only ever see the version in effect and the next one; old and withdrawn versions are kept for Quality Control Managers and auditors.

> **Tip:** Someone asked after a version was published — they joined the site, got the permission or were chosen later — has the site’s Days to confirm reading from then, so nobody is late on their first day.

Who has what to read, on the list, shows each person with the documents they still have to confirm; Not read in time shows only those who are late.



Who has what to read

REVIEWS AND OTHER CHANGES

A document is due for review a review cycle after its last review or new version; the list shows reviews due soon in orange and overdue ones in red. On the document's page, Quality Control Managers can:

- Record a review (no change needed): say what the review found; the next review is then due a cycle later.
- Change the details or who must read it: the code, title, type, review cycle and readers.
- Copy to another site: for Quality Control Managers of more than one site. The copy has the version in effect (and one about to take effect) with its files.
- Withdraw the newest version (published by mistake): only while nobody has confirmed reading it. The version before is the newest again, and the review the version counted as is undone. Otherwise publish a corrected version.
- Withdraw the document (no longer used): Users no longer see it and nobody is asked to read it. It is kept with all its versions and can be put back in use.

> **Note:** When two managers change the same document at once, the second is told that someone changed it first and sees that change. Every step is in the History at the bottom of the document's page.

SETTINGS

Quality Control Managers select Settings on the list to set, for each site:

- Review every (months): how long a document goes before it is due for review, unless it has its own cycle (12 to start with, 1 to 60).
- Remind this many days before: when Trend Alerts and the dashboard start warning (30; 7 to 120).
- Days to confirm reading: the confirm-by date offered for a new version, and the days someone asked later has (14; 1 to 90).
- Whether document reviews due, and documents not read in time, are reported on Trend Alerts and its daily email.

Select Save settings.

- Trend Alerts (6.13) reports document reviews due soon or overdue, and documents not read in time with who is late, and emails them to the site's Quality Control Managers.
- The QA Dashboard (6.14) has a Controlled documents tile, the Audit Pack (6.17) a section with the document register, and a management review (6.20) shows the counts.

> **Note:** Users have the Controlled Documents permission from the start, so they can read and confirm documents; take it away on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections) from anyone who shouldn't have it. Quality Control Managers have it already. Only Quality Control Managers add documents, publish and withdraw versions, record reviews, see who has read what and change the settings.

6.23 Shelf Life

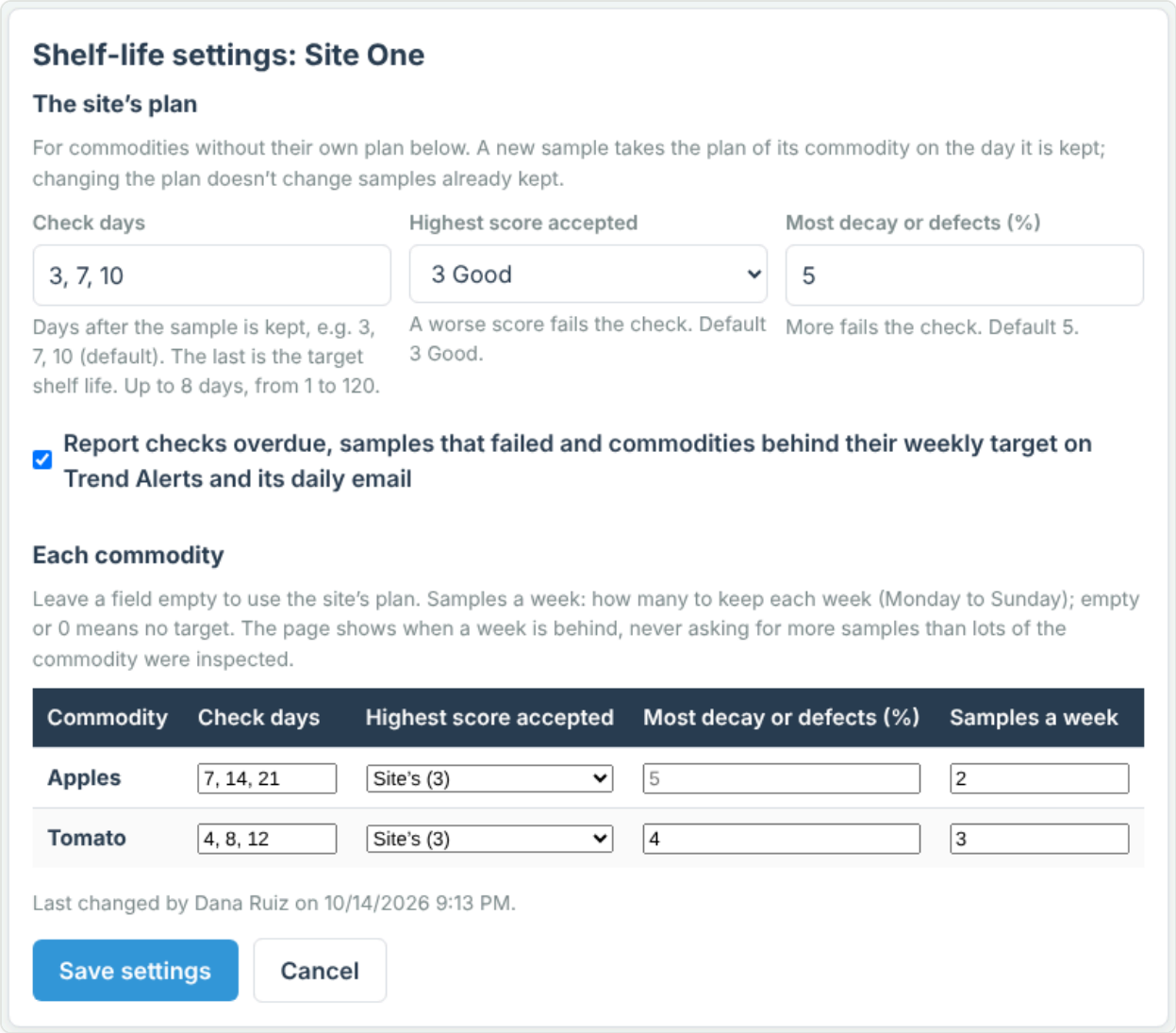
Lots > Shelf Life keeps samples from lots and checks them on set days after they were kept, to see whether each commodity keeps its condition for as long as it should — its target shelf life. Each check records the condition score, the share of units with decay or defects, a note and photos. A check past the commodity's limits fails the sample, and a corrective action can be raised from it. Customers and food safety audits often ask for this evidence; it is kept with the lot.

PLANS AND WEEKLY TARGETS

Each site has a plan: the days after a sample is kept on which it is checked (3, 7 and 10 to start with; the last is the target shelf life), the highest condition score accepted (3 Good) and the most units with decay or defects (5 %). Each commodity can have its own days and limits — for example berries on days 3, 5 and 7, tomatoes on 7, 14 and 21 — and a weekly target: how many samples of it to keep each week. A Quality Control Manager selects Settings on the list:

1. Under The site's plan, change the Check days (up to 8 days, from 1 to 120), the Highest score accepted and the Most decay or defects (%) if you need to.

2. Under Each commodity, enter a commodity's own check days, highest score or most decay; leave a field empty to use the site's. In Samples a week, enter how many samples of it to keep each week (Monday to Sunday); leave it empty for no target.
3. Leave the Trend Alerts switch ticked to have checks overdue, failed samples and commodities behind their target reported, and select Save settings.



Shelf-life settings for a site

Note: A sample keeps the plan it was kept with: changing the settings doesn't change samples already kept. Users see the plans (Plans on the list); only Quality Control Managers change them.

KEEPING A SAMPLE

1. Go to Lots > Shelf Life and select Keep a sample (Quality Control Managers with more than one site choose the Site first). Select Keep a sample next to a lot inspected in the last 7 days (choose a Commodity to see fewer), or type its serial or lot number and select Continue. You can also select Keep a shelf-life sample under the inspection on Edit Quality Inspections (6.6) or in the Lot Disposition window (6.7).
2. The form shows the lot and the plan for its commodity. Enter Kept on (day 0, from the inspection date to today) and, if you like, Kept where (for example the room and its temperature) and a Note, such as which cartons were taken.
3. Select Keep sample.



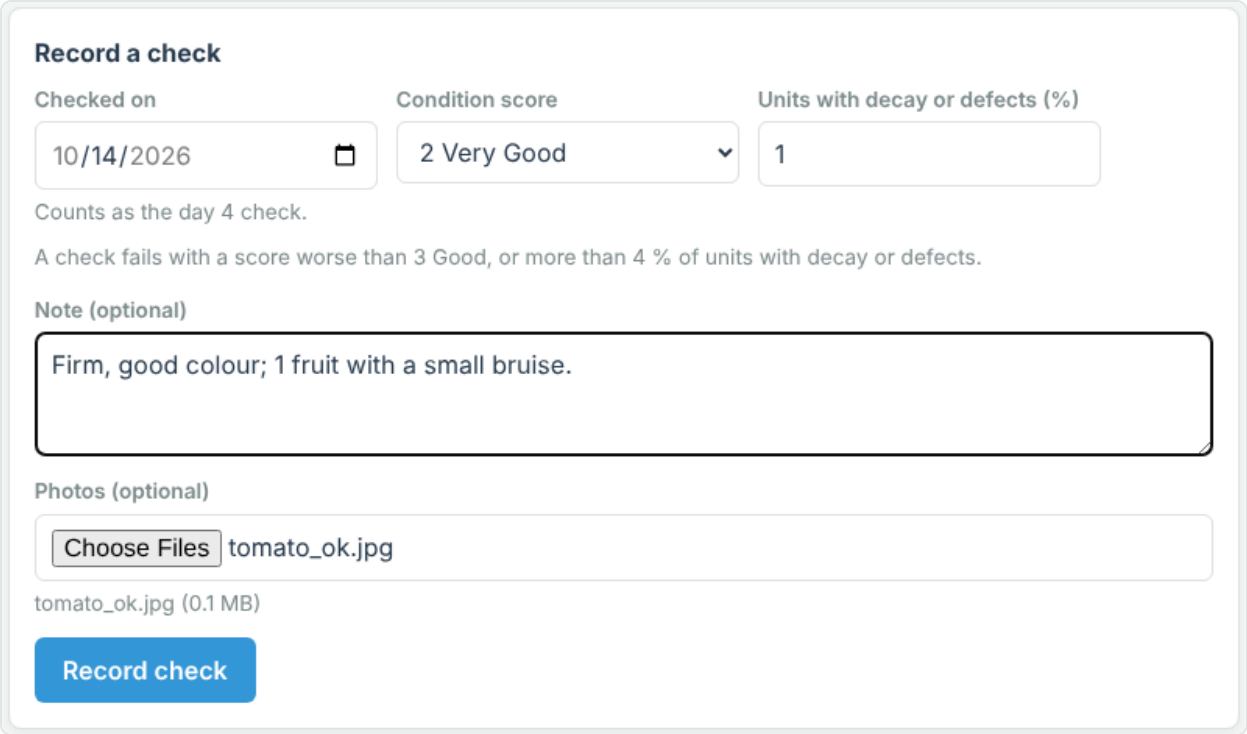
Keeping a shelf-life sample

> **Tip:** The page says when a sample was already kept from the lot. You can keep more than one, for example in two storage rooms.

RECORDING CHECKS

On each planned day, select the sample on the list and fill in Record a check:

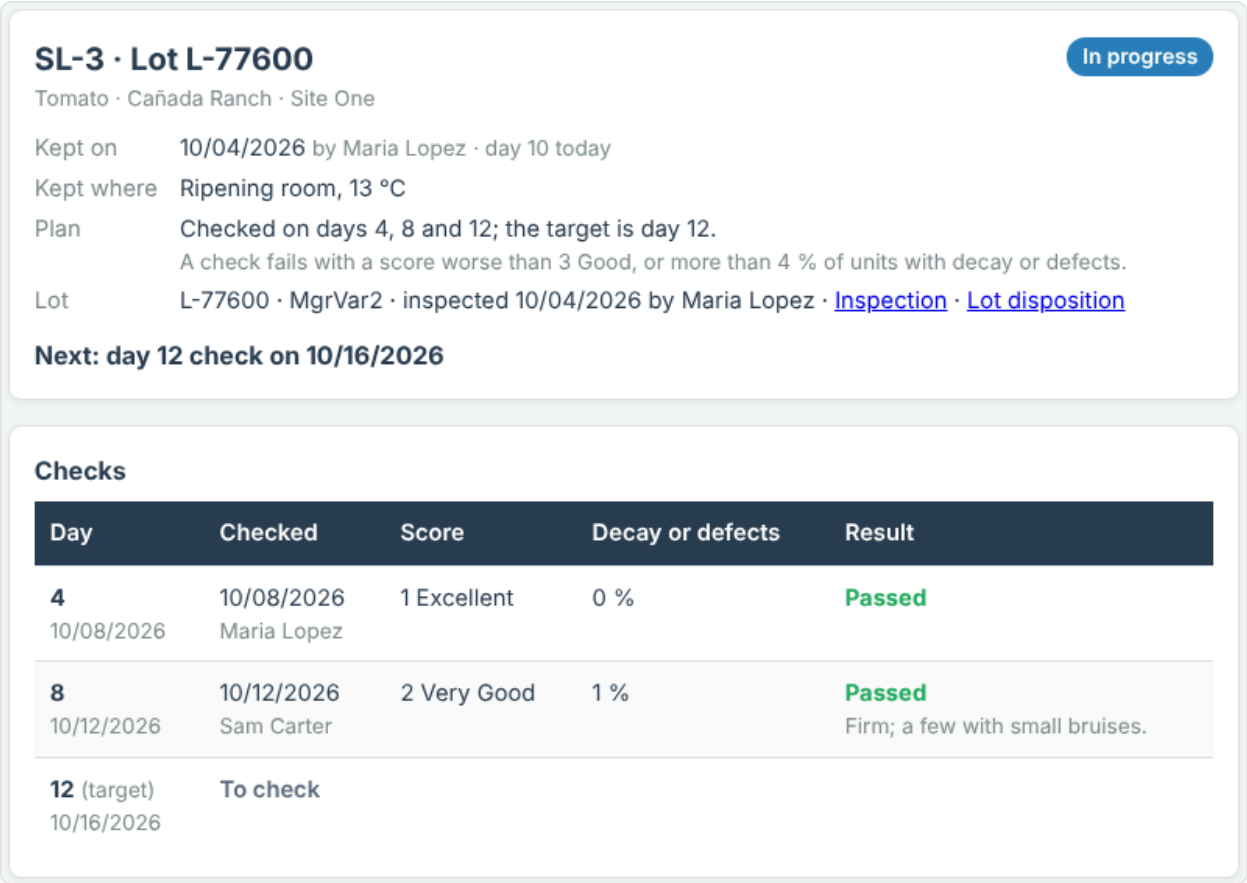
1. Checked on is today to start with; change it if the check was done earlier. The line under it says which planned day the check counts for.
2. Choose the Condition score (1 Excellent to 5 Poor) and enter the Units with decay or defects (%): the share of the units in the sample with decay or defects, for example 2.5.
3. Write a Note if you like, choose up to 3 Photos, and select Record check.



Recording a check

A check counts for the planned day nearest the sample's age on the day it was checked, among the days not checked yet. It can be a day early (for example on a Friday for a Saturday check), but never early on the target day. A day passed over is shown as missed. Photos are made smaller and stored as JPEG.

The sample's page shows its plan, where it is kept, its lot (with links to the inspection and to Lot Disposition) and each planned day: the check with who did it, the score, decay, result, note and photos, or when it is due.



A sample in progress

REACHING THE TARGET OR FAILING

A check fails when the score is worse than the highest accepted or the decay is above the most allowed. The sample has then failed at that day and isn't checked further. A sample that passes its check on the target day has reached its target.

SL-2 · Lot L-80400

Failed on day 8

Tomato · Sunrise Orchards · Site One

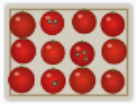
Kept on	10/03/2026 by Sam Carter
Kept where	Ripening room, 13 °C
Plan	Checked on days 4, 8 and 12; the target is day 12. A check fails with a score worse than 3 Good, or more than 4 % of units with decay or defects.
Note	3 cartons from pallet 5.
Lot	L-80400 · Roma · inspected 10/03/2026 by Maria Lopez · Inspection · Lot disposition

Failed on day 8

Checked 10/11/2026: score 4 Fair, decay or defects 6 %.

Corrective action: CA-6 Shelf life failed: lot L-80400 (Tomato), day 8 Open

Checks

Day	Checked	Score	Decay or defects	Result
4 10/07/2026	10/07/2026 Sam Carter	2 Very Good	1.5 %	Passed
8 10/11/2026	10/11/2026 Maria Lopez	4 Fair	6 %	Failed Soft spots and early mould on 6 of 100 fruit; skins split near the stem. 
12 (target) 10/15/2026	—			

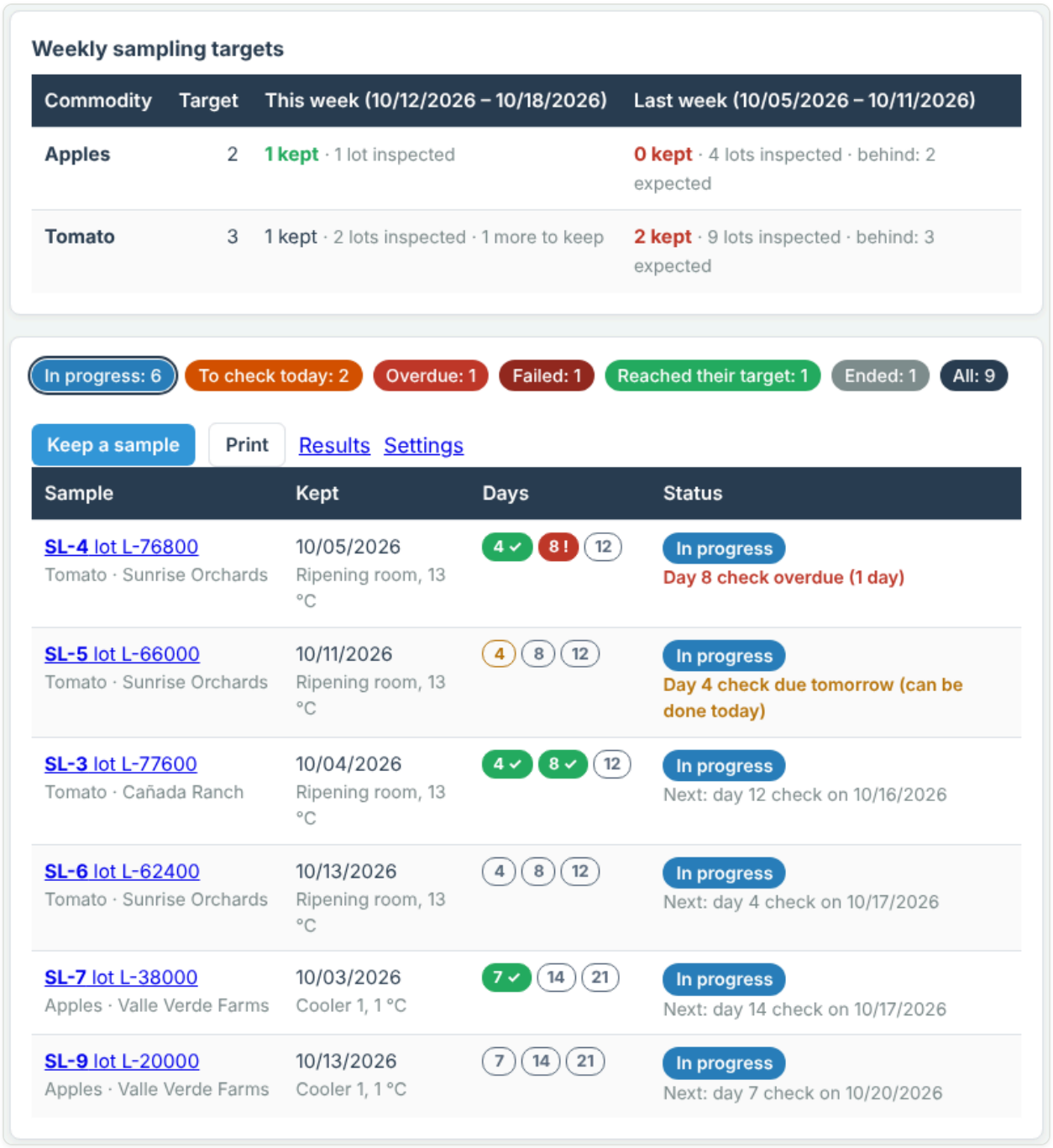
A failed sample with its corrective action

On a failed sample, select Raise corrective action to start a corrective action (see 6.9). The form is filled in from the failed check and the lot, and the sample and the corrective action link to each other.

THE SAMPLE LIST

The list shows the samples in progress, oldest due first, with the next check of each. Each planned day is a small badge: green with ✓ passed, red with × failed, red with ! overdue, grey with – missed. Select one of the colored counts to see those To check today (overdue, due today, or due tomorrow and so possible

today), Overdue, Failed, Reached their target, Ended or All. Filter by commodity, grower, or a sample, serial or lot number. Finished samples are those kept in the dates you choose (the last 90 days to start with); samples in progress are always shown.

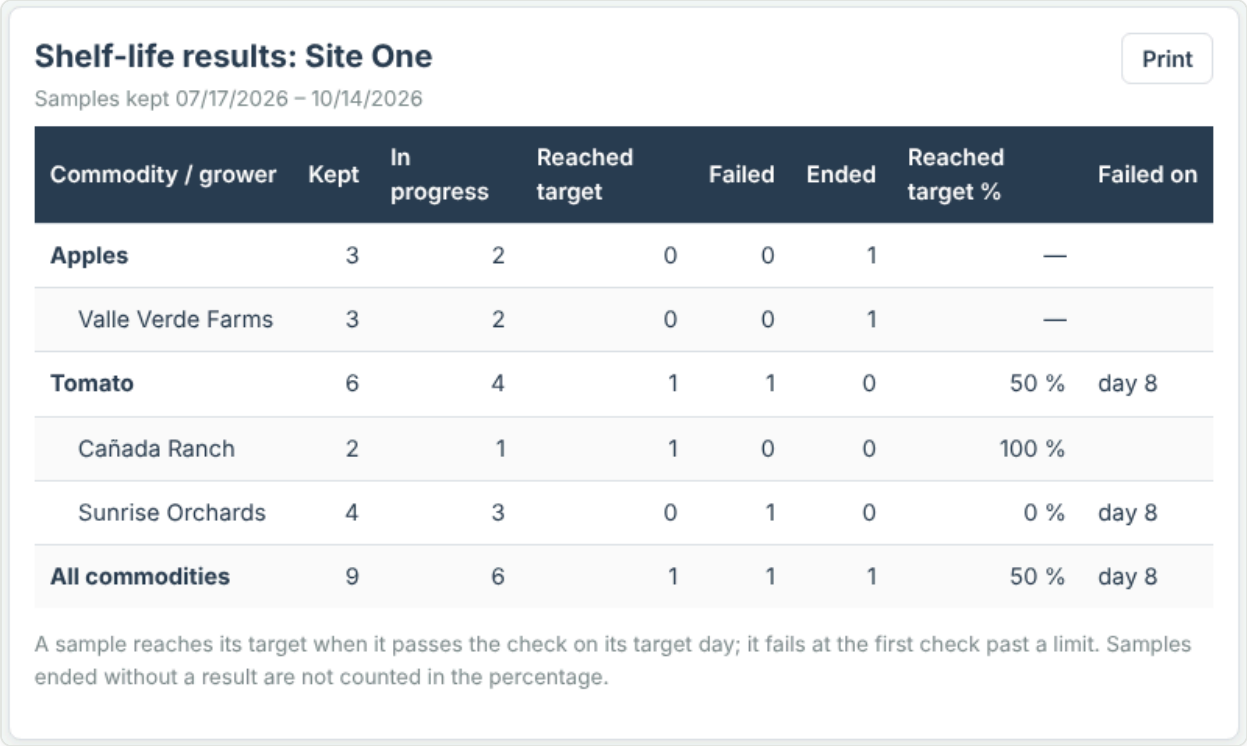


Weekly targets and the samples in progress

Weekly sampling targets shows, for each commodity with a target, the samples kept this week and last week. A week is behind when fewer samples were kept

than the target, or than the lots of the commodity inspected that week if there were fewer.

Results, on the list, shows for the dates you choose each commodity and its growers: the samples kept, in progress, that reached their target, failed (and on which day) and ended, and the share of those with a result that reached their target.



Shelf-life results: Site One

Print

Samples kept 07/17/2026 – 10/14/2026

Commodity / grower	Kept	In progress	Reached target	Failed	Ended	Reached target %	Failed on
Apples	3	2	0	0	1	—	
Valle Verde Farms	3	2	0	0	1	—	
Tomato	6	4	1	1	0	50 %	day 8
Cañada Ranch	2	1	1	0	0	100 %	
Sunrise Orchards	4	3	0	1	0	0 %	day 8
All commodities	9	6	1	1	1	50 %	day 8

A sample reaches its target when it passes the check on its target day; it fails at the first check past a limit. Samples ended without a result are not counted in the percentage.

Shelf-life results by commodity and grower

OTHER CHANGES

- Change where it is kept, or the note: while the sample is in progress.
- End the sample without a result: for a sample that can no longer be checked, for example lost or used, with the reason. It no longer counts as overdue.
- Remove the sample (kept by mistake): whoever kept it, or a Quality Control Manager, and only before any check. It is then no longer shown anywhere.
- Void the latest check (Quality Control Managers): for a check recorded by mistake. The sample is in progress again and the check can be recorded again; a corrective action raised from that failure is no longer linked to the sample.

- Take the sample up again (Quality Control Managers): for a sample ended by mistake.

> **Note:** When two people change the same sample at once, the second is told that someone changed it first and sees that change. Every step is in the History at the bottom of the sample's page.

- Trend Alerts (6.13) reports checks overdue, samples that failed (until a corrective action is raised from them) and commodities behind their weekly target, and emails them to the site's Quality Control Managers.
- The QA Dashboard (6.14) has a Shelf life tile, Grower Scorecards (6.11) show a grower's samples, the Audit Pack (6.17) has a section with every sample of the period, and a management review (6.20) shows the counts.

> **Note:** Give Users the Shelf Life permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections); they see it after they next sign in. Quality Control Managers have it already. Only Quality Control Managers change the settings, void checks and take ended samples up again.

6.24 Customer Specifications

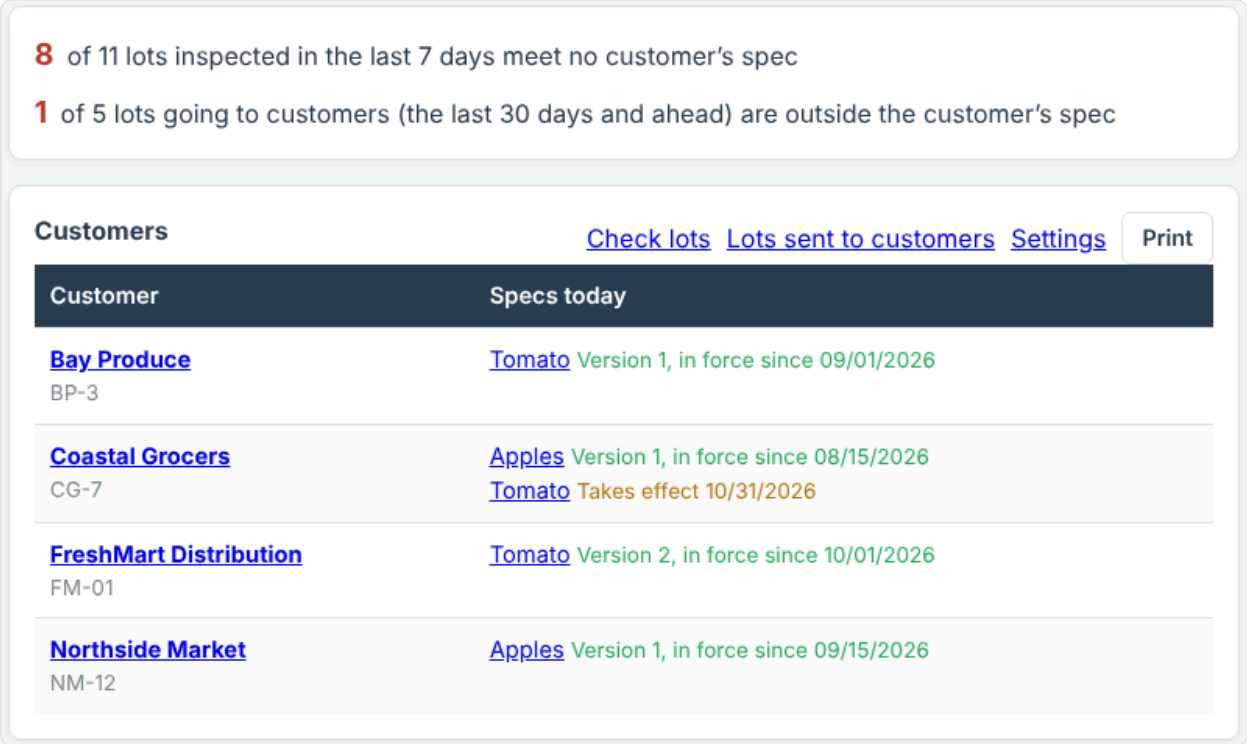
Lots > Customer Specifications keeps each customer's requirements for each commodity — the quality and condition scores, defects and sizes they accept, limits on answers of the inspection such as pulp temperature or Brix, and their spec sheet — and checks the lots inspected against them. When a lot goes to a customer whose spec it doesn't meet, the reason it goes anyway is kept with it. A spec changes in versions from a date, and a lot is always checked against the version in force on its inspection date.

CUSTOMERS

Each site has its own customer list. A Quality Control Manager adds one under Add a customer on the list: the Name, a Code if you like (its number in your own

system), its Address if you like (the regulator's traceability file gives it for what was shipped to the customer; see 6.28) and a Note, such as who to contact about quality, then selects Add customer. Change the name, code, address or note changes them later. Names already typed on Customer Claims are suggested.

To add many customers at once, a Quality Control Manager selects Import them from a file, beside Add customer, or Import customers on the list: the customer list of your ERP or shipping system, checked before anything is added (see Importing Customers in 6.70). The shipment import finds a customer by its Code first, then by its name.



The customers and their specs today

The list shows each customer with its specs today: the version in force and since when, or when a spec takes effect. The two lines above it count the lots of the last 7 days that meet no customer's spec, and the lots going to customers (from 30 days back and ahead) that are outside the customer's spec; select a count to see those lots.

Note: On a customer's page, Change the name, code or note corrects its details. When a customer no longer buys from you, select No longer a customer and say why: its specs and the lots sent to it are kept, but lots are no longer checked against its specs or recorded as going to it. Make it a customer again undoes it.

ADDING A SPEC

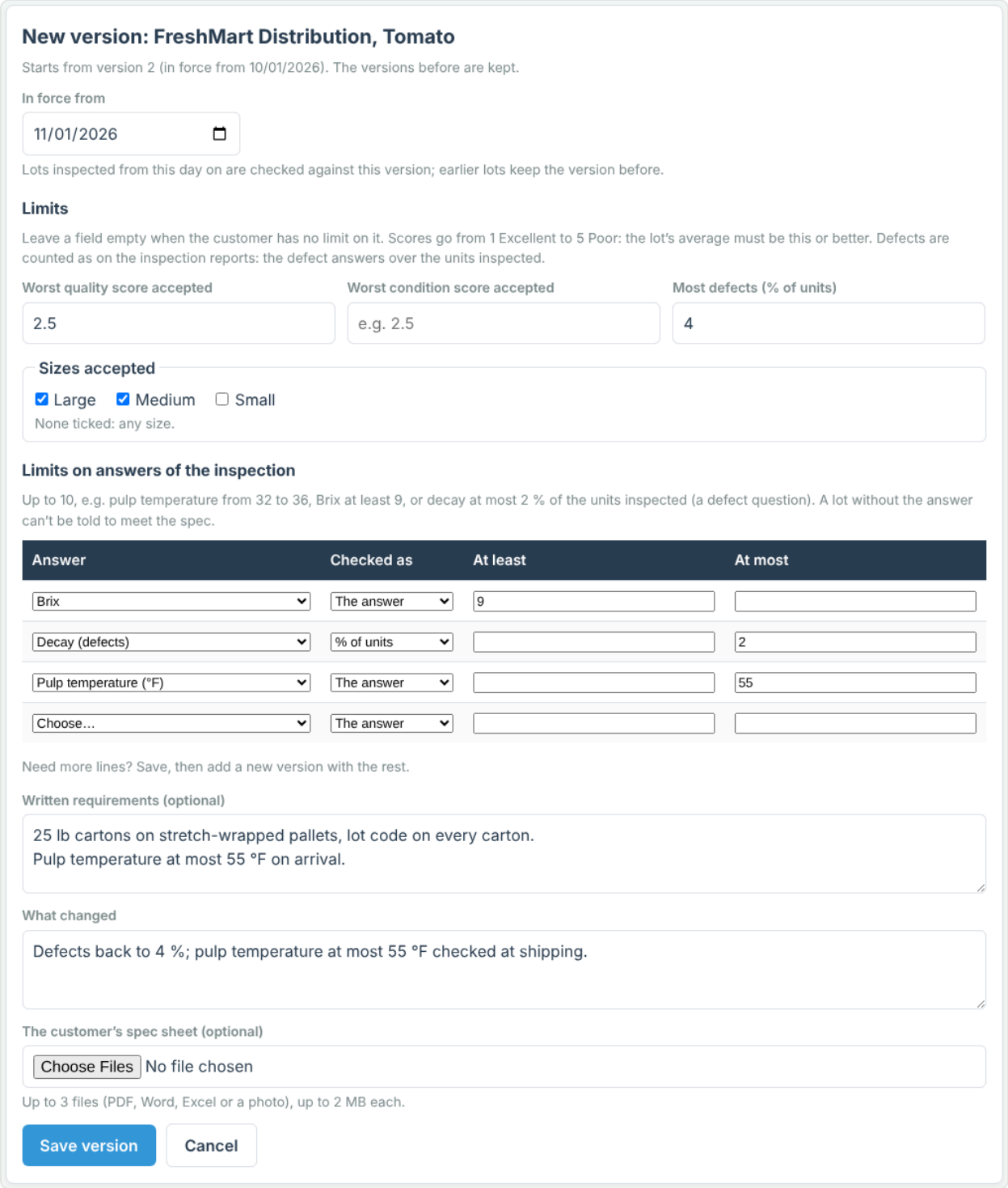
1. Select the customer on the list, then Add a spec. Choose the Commodity and select Continue.
2. In In force from, enter the day the spec takes effect (at most 90 days ahead). Lots inspected from that day on are checked against it; use an earlier day to check lots already inspected.
3. Under Limits, fill in only what the customer limits: the Worst quality score accepted and the Worst condition score accepted (1 Excellent to 5 Poor; the lot's average must be this or better), and the Most defects (% of units). Under Sizes accepted, tick the sizes the customer takes; none ticked accepts any size.
4. Under Limits on answers of the inspection, choose an Answer and enter At least, At most or both — for example pulp temperature from 32 to 36 °F (0 to 2 °C), or Brix at least 9. Temperatures are typed and shown in the site's unit, °F or °C (Cold Chain's, else the country's: °F in the United States, °C in Canada), whatever unit the question is answered in. For a defect answer, marked (defects), choose % of units in Checked as to limit the share of the units inspected, for example decay at most 2 %.
5. Enter any Written requirements that aren't checked (packing, labels, temperature on arrival), choose up to 3 files of the customer's spec sheet (PDF, Word, Excel or a photo) and select Save spec.

Note: Set at least one limit, or write the requirements. The answers offered are the commodity's number and defect questions. The form has 3 lines for limits on answers, or 2 more than the version before, up to 10: for more, save and add a new version with the rest.

VERSIONS

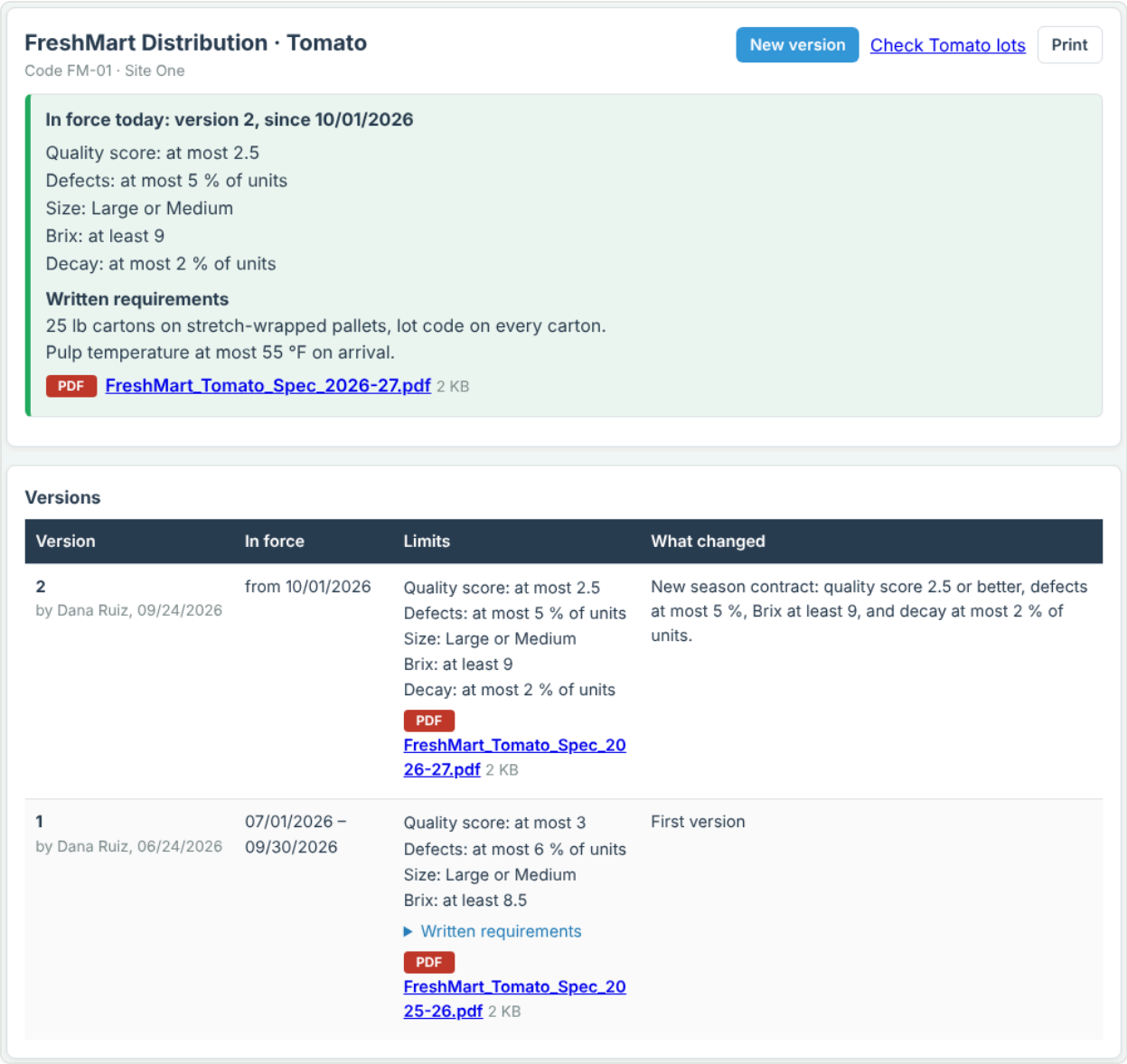
A spec is never changed in place. When the customer’s requirements change, open the spec and select New version. The form starts from the newest version:

1. Enter In force from: a day after the newest version’s, at most 90 days ahead. Lots inspected from that day on are checked against the new version; earlier lots keep the version before.
2. Change the limits, sizes and written requirements as needed, and say What changed.
3. Choose the customer’s new spec sheet if there is one, and select Save version.



A new version of a spec

The spec's page shows the version in force today with its limits, written requirements and files, and below it every version: when it was in force, who added it, its limits and what changed.



A spec with its versions

- Withdraw version 2 (added by mistake), below the versions: for the newest version only, with the reason. The one before is in force again for the days it covered. Withdrawing the only version removes the spec; adding one for that commodity again carries on its numbering.
- Retire the spec: when the customer no longer buys the commodity, or no longer has requirements for it. Enter No longer applies from (at most 90 days ahead) and why; lots inspected from that day on aren't checked against it. Its versions are kept, and Use the spec again brings it back.

> **Note:** Lots already recorded as going to a customer keep the check made then, whatever happens to the spec later. Files of a withdrawn version only open for Quality Control Managers.

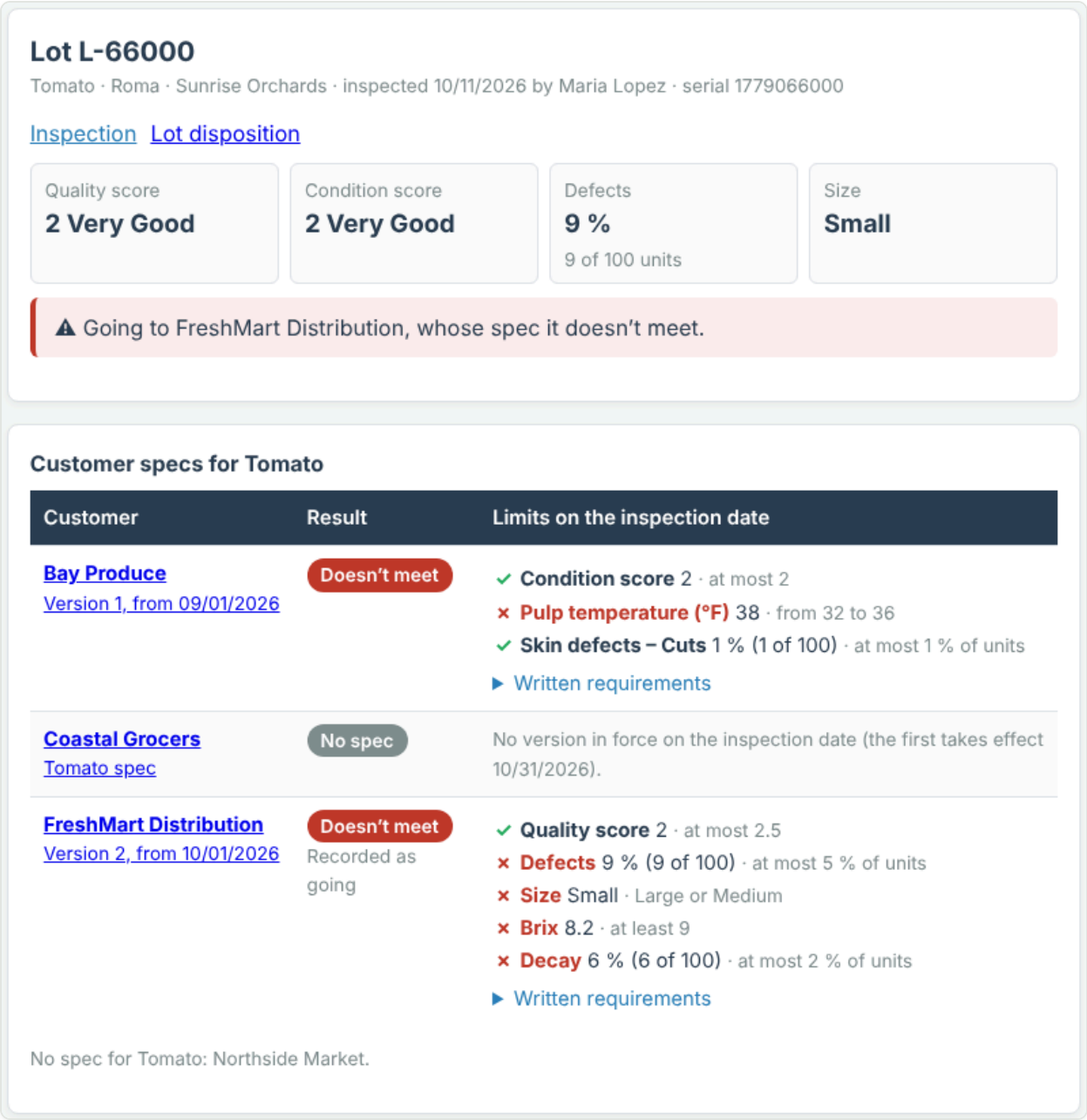
HOW A LOT IS CHECKED

A lot is checked against the spec of each customer with one for its commodity, using the version in force on its inspection date:

- Quality and condition: the average of the inspection's quality and condition score answers, with one decimal.
- Defects: the defect answers over the units inspected, as on the inspection reports. A defect answer left empty counts as none.
- Size: the size recorded on the inspection. When it has two sizes, both must be accepted.
- Limits on answers: the inspection's answer, or for % of units, the defect answer over the units inspected. A temperature is compared in the question's own unit, exactly as typed, whatever unit the site shows; only what is shown is converted (with one decimal).

The lot Meets the spec when every limit is within it, and Doesn't meet it when one is past it. It shows Can't tell when the inspection lacks an answer a limit needs, such as no size recorded or no Brix answer. With no version in force on the inspection date, it has No spec.

Open a lot from Check lots (below), with Customer specs under the inspection on Edit Quality Inspections (6.6), or from the Lot Disposition window (6.7). Its page shows what the inspection measured and, for each customer, the result and every limit with ✓ within it, × past it or ? not told.



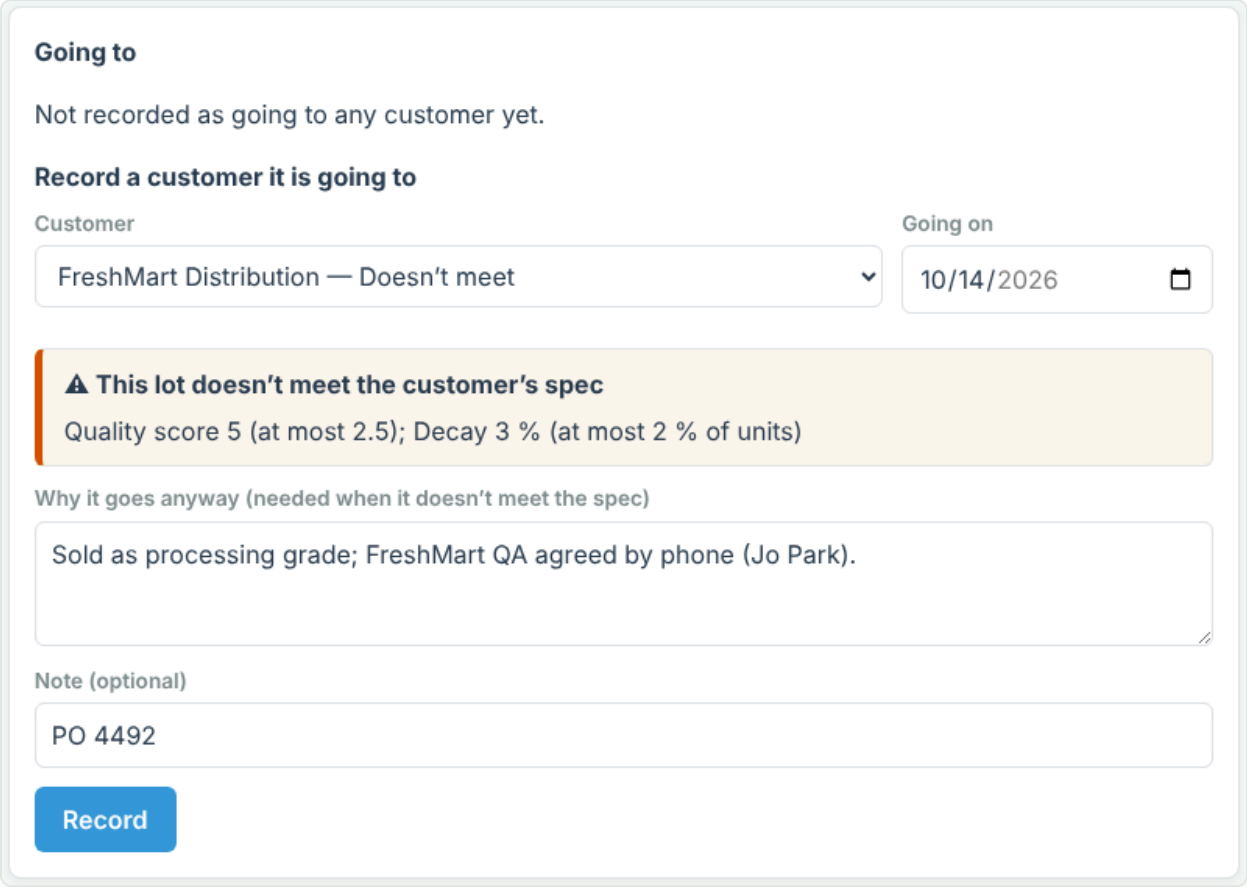
A lot against the customers' specs

RECORDING WHERE A LOT GOES

When a lot is sold or shipped, a Quality Control Manager records each customer it goes to on the lot's page, under Going to:

1. Under Record a customer it is going to, choose the Customer — the list says whether the lot meets each one's spec — and enter Going on: the day it goes, from the inspection date to 30 days ahead.

2. If the lot doesn’t meet the customer’s spec, or can’t be told, a box shows the limits it fails. Enter Why it goes anyway, for example that the customer accepted it by email; the record can’t be saved without it.
3. Enter a Note if you like, such as the order or truck number, and select Record.



Recording a customer a lot is going to

The record keeps the check as it was then, even if the inspection or the spec changes later. A lot recorded as going outside the spec is reported on Trend Alerts for 14 days, and shows a warning on Edit Quality Inspections and Lot Disposition. A record made by mistake is removed with Remove (recorded by mistake) and the reason; its Traceability shipping event, if it has one, is voided with it, with the same reason (see 6.61).

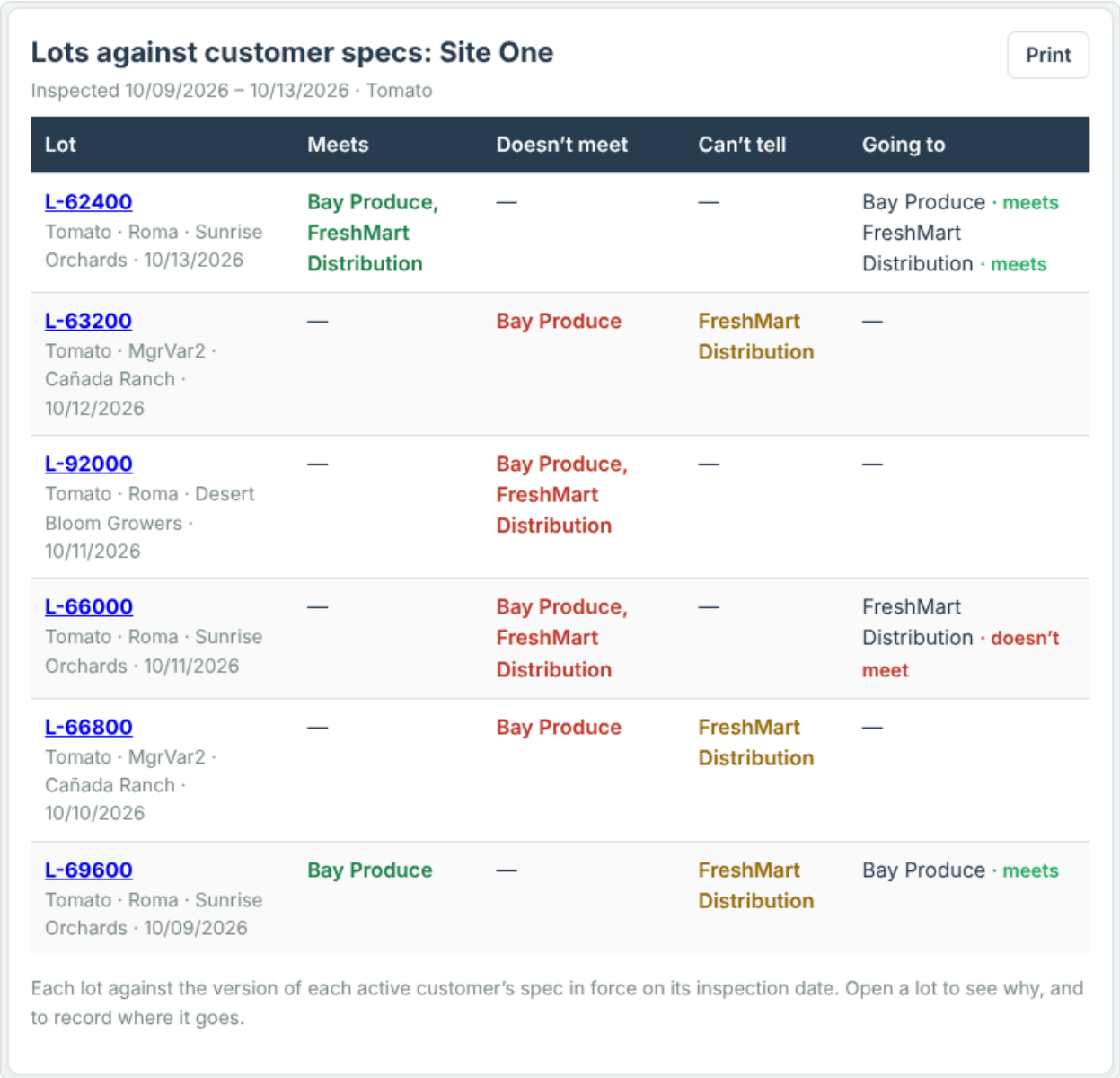
Lots are also recorded as going to customers many at a time, by shipments: scanned or pasted on Shipments, from a released load, or from the shipping system’s file (see 6.70). Under Going to, such a lot shows its shipment’s number, which opens it, and its cases; a lot sent to the same customer on several

shipments is listed under the customer's name, once for each. Here, a lot is recorded as going to a customer only once: a customer it already goes to isn't offered.

> **Tip:** Under each customer a lot is going to, Issue a quality certificate makes the certificate for that customer, and Quality certificate … opens the one already issued (see 6.25).

CHECKING LOTS

Check lots, on the list, shows the lots inspected in a period (the last 7 days to start with) with the customers whose spec each meets, doesn't meet or can't tell, and where each is going. Choose the Inspected from and To dates, a commodity, and under Show, All lots, Meeting no customer's spec, Not meeting a spec or That can't be told, then select Apply Filter. Select a lot to see why and to record where it goes.



Checking lots against the customers' specs

Up to the newest 500 lots, inspected in at most 92 days, are checked at once; narrow the dates or choose a commodity if the page says so. Lots sent to customers, on the list, shows the records by the day the lots go (from 30 days back and 30 ahead to start with), for the Sites chosen (one, a group, chosen sites or all your sites, see 6.68; with several, a Site column and a Customer (name) to type), for one customer or all, and all of them or only those Outside the spec, with the reason each went anyway and, for a lot on a shipment, the shipment's number and the cases. The newest 1,000 records are listed; CSV downloads them all. A lot sent to the same customer on several shipments is counted once.

Settings, on the list, says how lots are checked. A Quality Control Manager can clear the switch there to stop reporting lots sent outside the spec on Trend Alerts and its daily email, and select Save settings.

> **Note:** When two people change the same customer or spec at once, the second is told that someone changed it first and sees that change. Customers, specs and the records of where a lot goes each have a History at the bottom of their page.

- Edit Quality Inspections (6.6) and Lot Disposition (6.7) show which customers' specs a lot meets, and warn when it is going to a customer whose spec it doesn't meet.
- Customer Claims (6.10) suggests the site's customers, and a claim about a lot shows whether it met that customer's spec.
- Trend Alerts (6.13) reports lots going to a customer outside its spec. The QA Dashboard (6.14) has a Customer specs tile, the Audit Pack (6.17) a section with the specs and the lots sent, and a management review (6.20) shows the counts.
- Shipments (6.70) records a customer's lots at once, and Lots for an order finds the lots that meet a customer's spec. The list links to them, and, for Quality Control Managers, to Import shipments and Import customers.

> **Note:** Give Users the Customer Specifications permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections); they see it after they next sign in. Users see the specs, the spec sheets and how lots stand. Quality Control Managers have it already; only they add and change customers, specs and versions, record where lots go and change the settings.

6.25 Quality Certificates

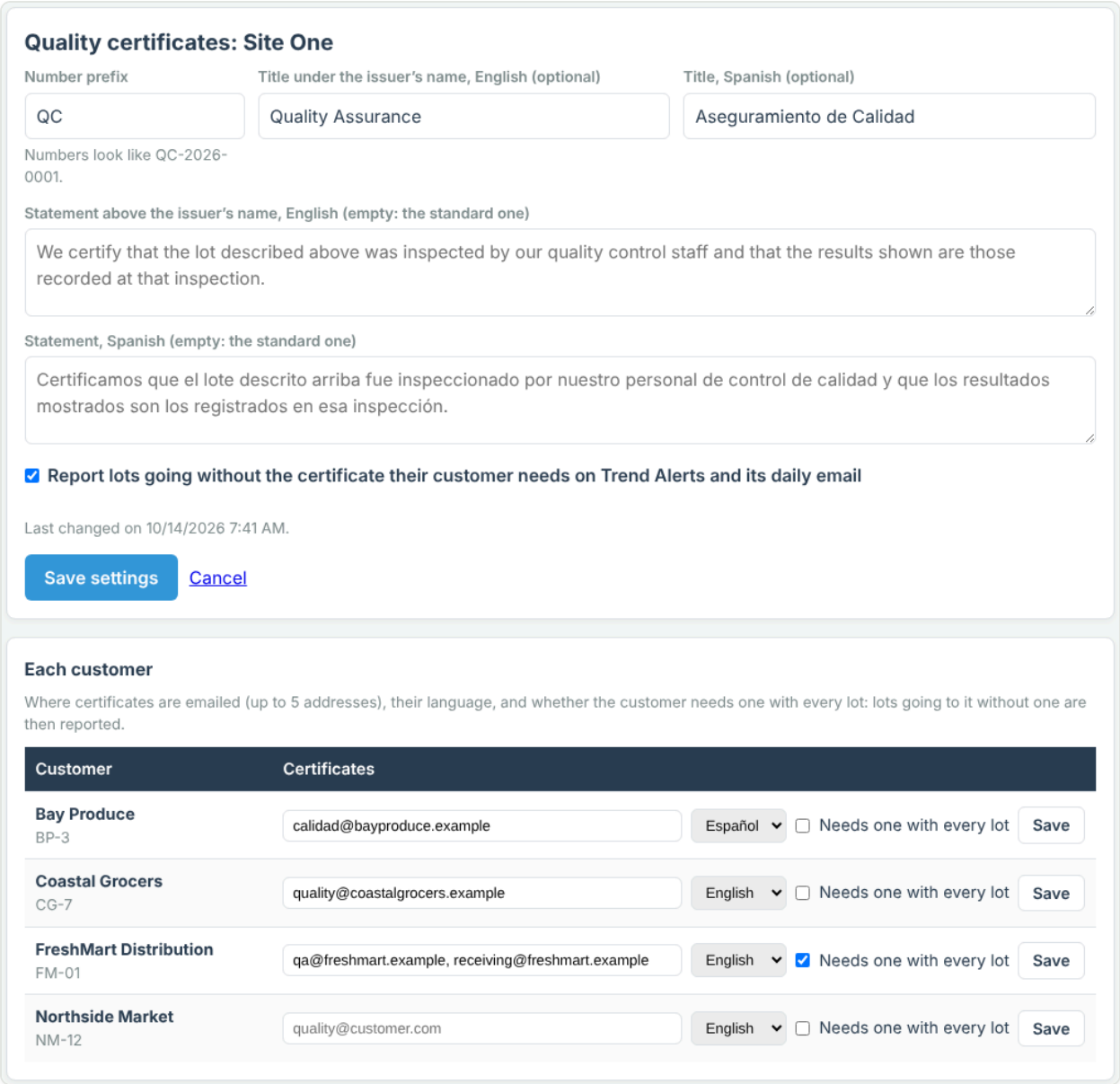
Lots > Quality Certificates issues a quality certificate for a lot going to a customer: a PDF on the site's letterhead with the inspection results, how the lot stands

against the customer’s spec, the sign-off and who issued it. Each certificate is numbered and kept exactly as issued, can be emailed to the customer with the PDF attached, and is corrected by issuing a replacement. Certificates are issued for the lots recorded as going to customers on Customer Specifications (see Recording Where a Lot Goes in 6.24), whether recorded there or by a shipment (see 6.70).

SETTING UP

Certificates can be issued with the standard settings. To change them for a site, and to say how each customer gets its certificates, a Quality Control Manager goes to Lots > Quality Certificates and selects Settings:

1. In Number prefix, enter the letters in front of each number (QC to start with). Certificates are numbered by site and year, such as QC-2026-0001, and the count starts again each year.
2. If you like, enter the Title under the issuer’s name, English and Spanish, such as Quality Assurance. It is printed, with the site’s name, under the name of whoever issues the certificate.
3. The Statement above the issuer’s name is printed on every certificate, beside who issued it. Leave it empty for the standard one, or write your own in English and in Spanish.
4. Leave Report lots going without the certificate their customer needs on Trend Alerts and its daily email ticked to have those lots reported (see below), and select Save settings.



Quality certificate settings for a site

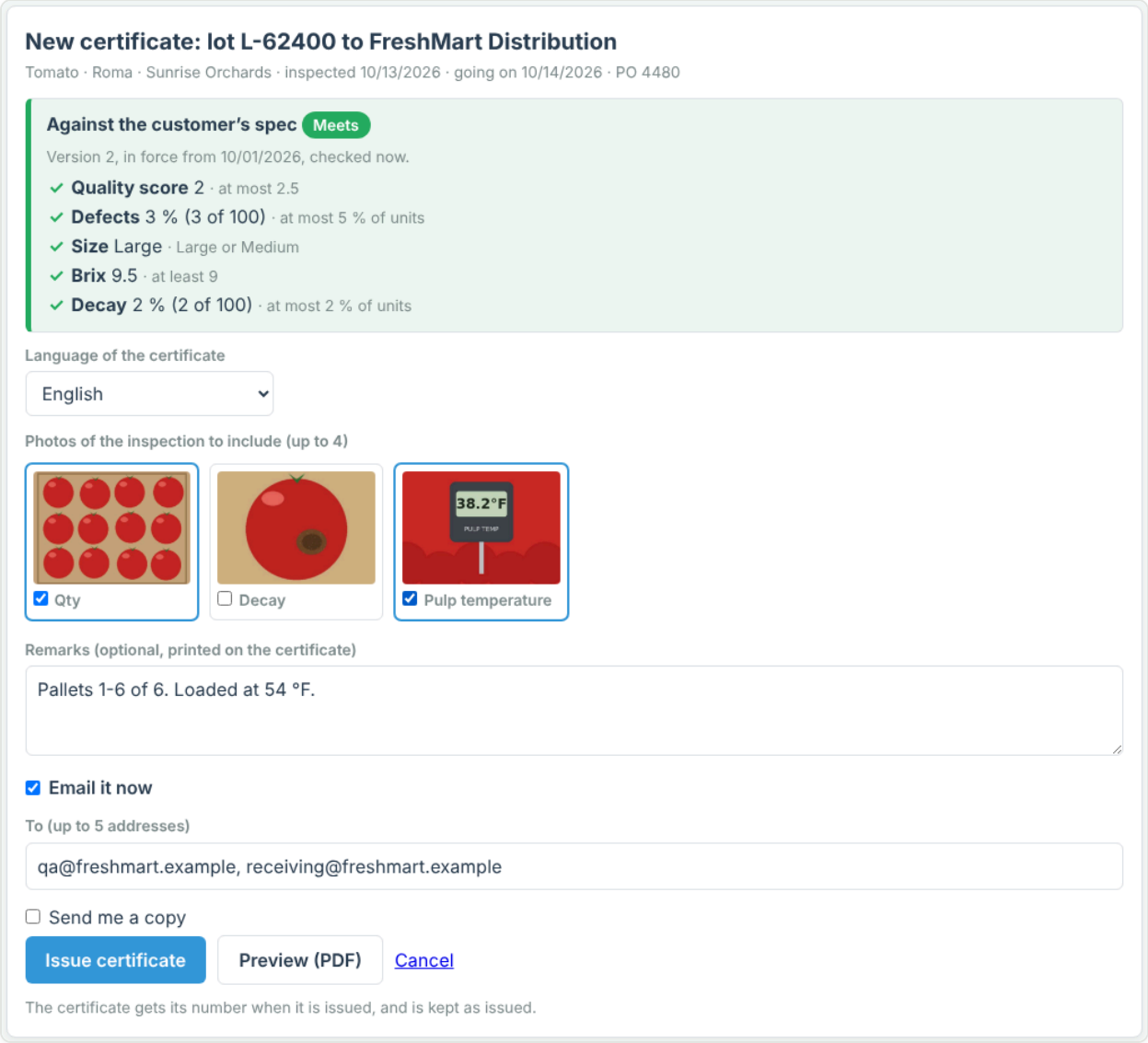
Under Each customer, set for each of the site's customers (those on Customer Specifications) where its certificates are emailed — up to 5 addresses, separated by commas — the language of its certificates, and Needs one with every lot for a customer who requires a certificate with each delivery. Select Save on the customer's line.

> **Note:** The certificate shows the site's name, address and logo, as set on gear > Sites > Add / Change Sites (3.1), with the site's country (QA Setup, 6.32) and its temperature limits in the site's unit, °F or °C, and is emailed from the site's email account (3.2). Dates and times on it are the site's.

ISSUING A CERTIFICATE

Quality Control Managers, and Users with the Quality Certificates permission, issue certificates:

1. On Lots > Quality Certificates, select Issue certificate next to the lot under Lots going to customers without a certificate. You can also select Issue a quality certificate under the inspection on Edit Quality Inspections (6.6), or under Going to on the lot's page in Customer Specifications (6.24).
2. Check Against the customer's spec. The lot is checked now against the customer's spec in force on its inspection date, and the certificate shows the result, whatever it is. If the lot doesn't meet the spec, or can't be checked, enter Why it is released to the customer: it is printed on the certificate. The reason given when the lot was recorded as going is filled in.
3. Choose the Language of the certificate (the customer's, from Settings, to start with).
4. Under Photos of the inspection to include, tick up to 4 of the inspection's photos, and enter any Remarks, such as the pallets or the temperature at loading. Both are printed on the certificate.
5. To email it at once, leave Email it now ticked. To holds the customer's addresses from Settings: change them if needed (up to 5), and tick Send me a copy if you want one.
6. Select Preview (PDF) to see the certificate in a new tab without issuing it, then select Issue certificate.



Issuing a certificate

The certificate gets its number when it is issued, and its PDF is kept exactly as issued: later changes to the inspection or the spec don't change it. The certificate's page opens and says whether it was emailed.



Site One
PACKING & QUALITY

Site One
1450 W Frontage Rd
Nogales, AZ 85621

Quality Certificate

No. QC-2026-0003
Issued 10/13/2026 4:58 PM
Replaces QC-2026-0002

Customer

Customer	FreshMart Distribution
Customer code	FM-01
Ship date	10/13/2026
Reference	PO 4471

Lot

Lot	L-66000
Product	Tomato · Roma
Grower	Sunrise Orchards
Inspected	10/11/2026 8:00 AM
Inspector	Maria Lopez
Inspection no.	1779066000
Sign-off	Signed off by Dana Ruiz on 10/12/2026 9:05 AM

Inspection results

Measure	Result
Quality score (average)	2 Very Good
Condition score (average)	2 Very Good
Units inspected	100
Units with defects	9 % (9 of 100)
Size	Small

Against the customer's specification

FreshMart Distribution, Tomato: version 2, in force from 10/01/2026 (the version in force on the inspection date).

Does not meet the customer's specification

Requirement	Limit	This lot	Result
Quality score	at most 2.5	2	Pass
Defects	at most 5 % of units	9 % (9 of 100)	Fail
Size	Large or Medium	Small	Fail
Brix	at least 9	8.2	Fail
Decay	at most 2 % of units	6 % (6 of 100)	Fail

Released to the customer because:
FreshMart QA (Jo Park) accepted it for their processing line, by email.

Remarks

Pallets 1-5 of 5. Loaded at 54 °F.

We certify that the lot described above was inspected by our quality control staff and that the results shown are those recorded at that inspection.

Issued by
Dana Ruiz
Quality Assurance, Site One
10/13/2026 4:58 PM (America/Phoenix)

Quality certificate QC-2026-0003 · Site One

Page 1 of 1

A quality certificate

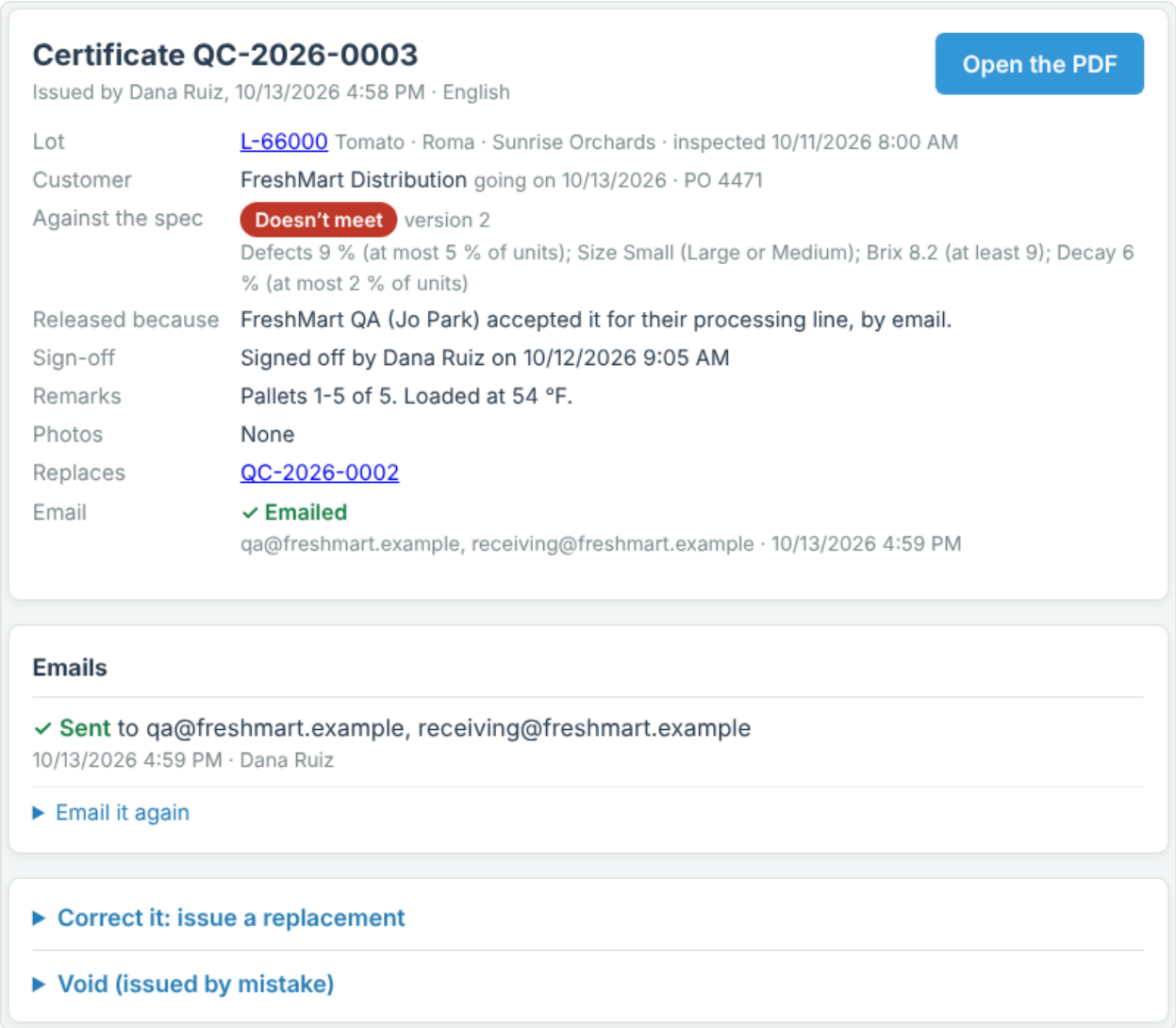
The certificate shows the number and when it was issued; the customer, the ship date and the reference: for a lot recorded by a shipment, the shipment's order and

bill of lading (Order FM-4610 · Bill of lading 558120), else the note typed when the lot was recorded as going; the lot, product, grower, inspection date, inspector and inspection number, and the sign-off when the site uses inspection sign-off; the inspection results; the customer’s spec, with each limit, what the lot measured and Pass or Fail; why the lot was released, when it didn’t meet the spec; and the remarks, the photos and the statement with who issued it. The form shows the same reference on its top line. When the customer has no spec for the commodity, the certificate says so and shows what the inspection measured.

> **Note:** A lot has one certificate in force for each record of it going to a customer: a lot sent to the same customer on two shipments has one for each. If one was issued meanwhile, for example by someone else, the page says so and opens it.

EMAILING A CERTIFICATE

A certificate is emailed with its PDF attached, in its language, from the site’s email account. Its page shows under Email where it was last sent, and under Emails every try, with when, who sent it and to whom, and the mail server’s answer when it failed. To send it again, for example to another address or after a failure, select Email it again, check the addresses in To, and select Send.



A certificate's page

Open the PDF opens the certificate as issued, to print or save.

> **Note:** When the site's email account isn't set up, the certificate is issued but not emailed, and the page says so: set it up on Verify / Modify Email Configuration (3.2), then email it again. When the mail server doesn't take it, Email failed shows on the list and on the QA Dashboard until it is sent.

CORRECTING A CERTIFICATE

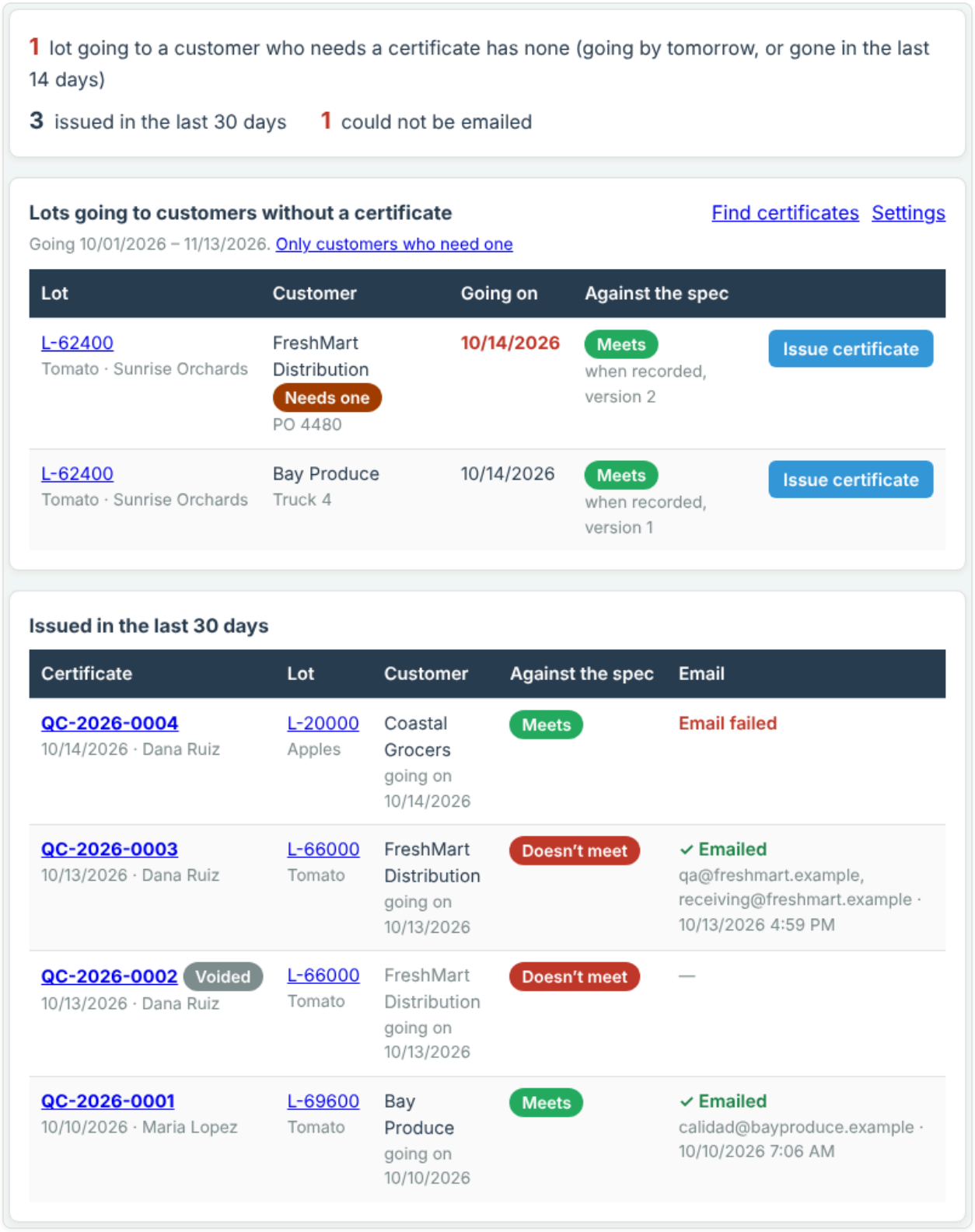
A certificate is never changed. Quality Control Managers correct one from its page:

- Correct it: issue a replacement, then Replace: opens the form filled in as the certificate. Change the photos, remarks, reason or language, say Why it is replaced and select Issue the replacement. The replacement is made from the inspection as it is now, gets a new number and says which certificate it replaces; the old one is voided and says what replaced it. Email the replacement to the customer.
- Void (issued by mistake): for a certificate that shouldn't have been issued, with the reason. A voided certificate stays listed, marked Voided, and can no longer be emailed; its PDF still opens, with (VOIDED) in its name, or (ANULADO) for a Spanish one. If it was already sent, tell the customer.

> **Note:** When the record of a lot going to a customer is removed (recorded by mistake), or its shipment is voided (see 6.70), its certificate's page says so: void the certificate if it wasn't sent. Every certificate has a History at the bottom of its page.

THE LIST AND FINDING CERTIFICATES

Lots > Quality Certificates opens on the site's list (Quality Control Managers with more than one site choose the Site and select Apply Filter). The counts at the top are the lots going to customers who need a certificate that have none (going by tomorrow, or gone in the last 14 days), the certificates issued in the last 30 days, and those whose last email failed; select one to see them.



The Quality Certificates list

Lots going to customers without a certificate lists the lots recorded as going in the next 30 days, or gone in the last 14 days, that have no certificate in force: Needs

one marks a customer who needs one with every lot, and the date is red when such a lot goes by tomorrow or has gone. Select Only customers who need one to see only those. Issued in the last 30 days lists the newest certificates, with how each lot stood against the spec and whether it was emailed.

Find certificates searches all the site's certificates: choose the Issued from and To dates, a Customer, under Show All, In force or Voided, under Email Any, Last email failed or Not emailed, or type a Number, lot or serial to search any date, and select Apply Filter.

When a customer needs a certificate with every lot, a lot going to it by tomorrow, or gone in the last 14 days, without one is reported on Trend Alerts and its daily email until its certificate is issued. A Quality Control Manager can clear the switch in Settings to stop this.

- Edit Quality Inspections (6.6), under the inspection, and the lot's page in Customer Specifications (6.24), under Going to, open the lot's certificate for each customer, or issue it.
- A customer claim about a lot (6.10) shows the lot's certificates for that customer.
- Trend Alerts (6.13) reports lots going without the certificate their customer needs. The QA Dashboard (6.14) has a Quality certificates tile, the Audit Pack (6.17) a section with the certificates issued, and a management review (6.20) shows the counts.

> **Note:** Give Users the Quality Certificates permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections); they see it after they next sign in. Users issue and email certificates. Quality Control Managers have it already; only they replace and void certificates and change the settings.

6.26 Inspector Calibration

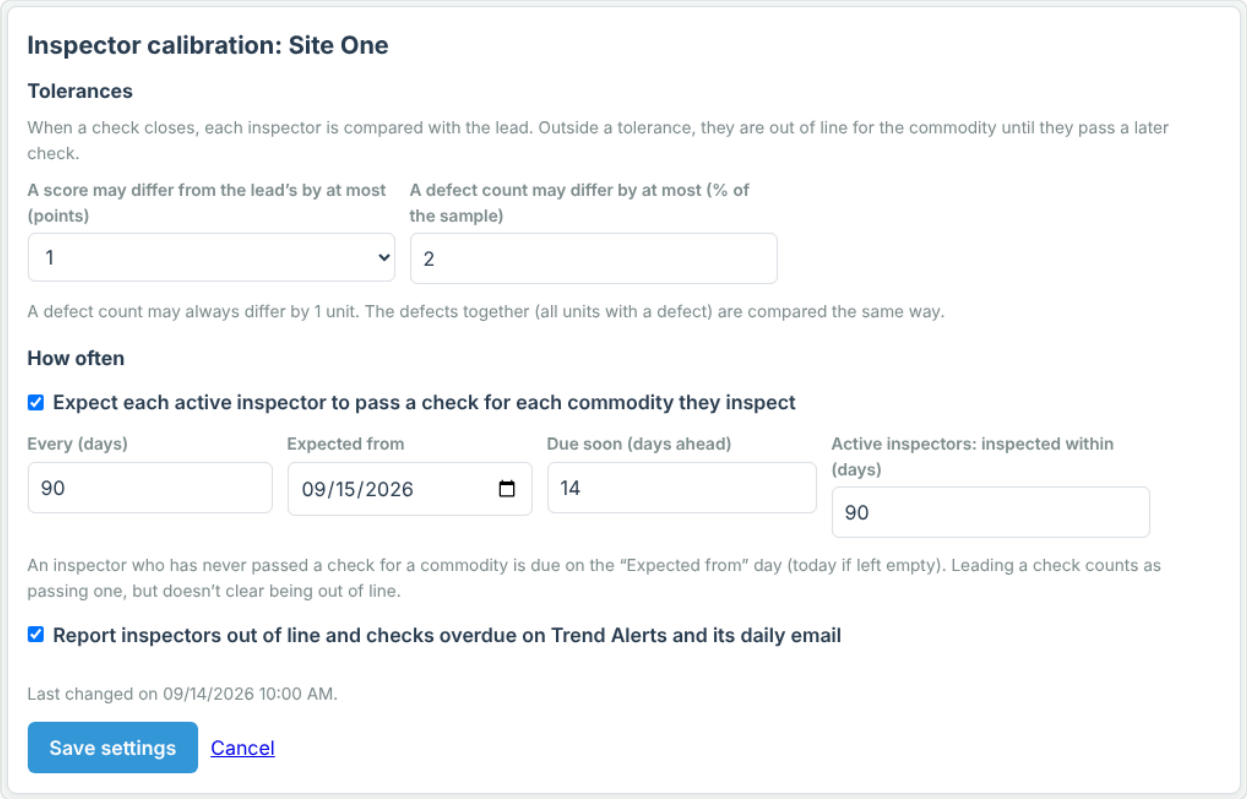
Growers > Inspector Calibration checks that your inspectors grade alike. In a calibration check, they inspect the same sample of a commodity and each enters

the scores and defect counts they find, without seeing anyone else's. The lead enters the reference result, and when the check closes, each inspector is compared with the lead within the site's tolerances. An inspector outside them is out of line for that commodity until they pass a later check. A site can also expect each inspector to pass a check for each commodity they inspect every so many days.

SETTING UP

The standard tolerances can be used as they are. To change them, or to expect checks on a schedule, a Quality Control Manager goes to Growers > Inspector Calibration and selects Settings:

1. Choose how far a score may differ from the lead's (0 to 2 points; 1 to start with), and how far a defect count may differ, as a % of the units in the sample (2 to start with). A defect count may always differ by 1 unit, and all the defects together are compared the same way.
2. To expect checks, tick Expect each active inspector to pass a check for each commodity they inspect, and enter Every (days) (90 to start with) and Expected from: an inspector who has never passed a check for a commodity is due that day (today if left empty). Due soon (days ahead) and Active inspectors: inspected within (days) say when a check shows as due soon, and who counts as an active inspector of a commodity.
3. Leave Report inspectors out of line and checks overdue on Trend Alerts and its daily email ticked to have them reported, and select Save settings.



Inspector calibration settings for a site

> **Note:** Until checks are expected, nobody is overdue, but inspectors are still flagged when they are out of line.

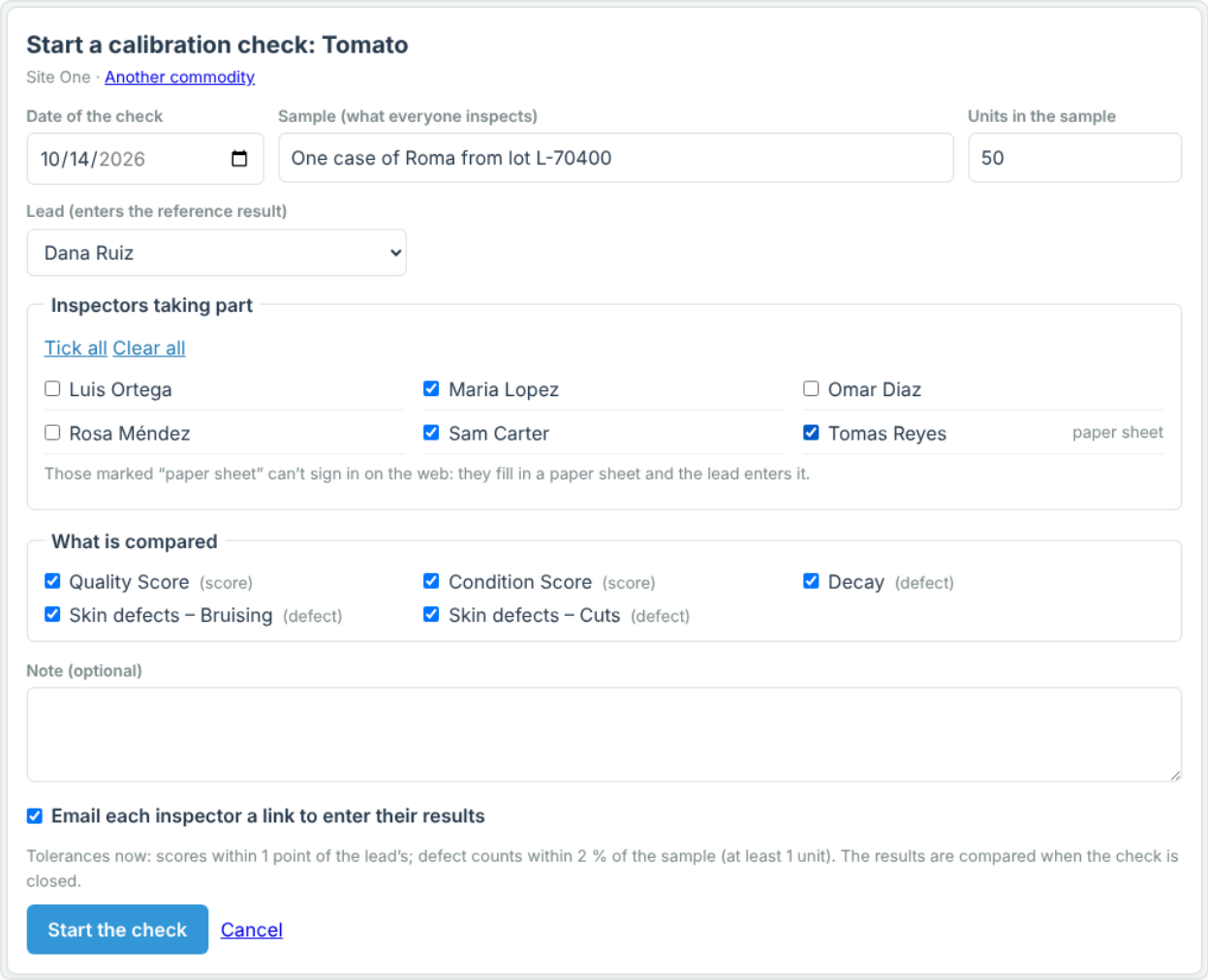
STARTING A CHECK

Quality Control Managers, and Users with the Inspector Calibration permission, start checks. Prepare the sample first, such as a case from a lot, and count its units:

1. Go to Growers > Inspector Calibration and select Start a check. Choose the Commodity and select Continue.
2. Enter the Date of the check (today, or up to 30 days back), the Sample everyone inspects, and the Units in the sample.
3. Choose the Lead, who enters the reference result: a Quality Control Manager, or a User with the Inspector Calibration permission (you, to start with).
4. Under Inspectors taking part, tick who inspects the sample. Those marked paper sheet can't sign in on the web: they fill in a paper sheet, and the lead

types it in.

5. Under What is compared, the commodity's score questions and defects are ticked; clear any you don't want compared.
6. Leave Email each inspector a link to enter their results ticked, and select Start the check.



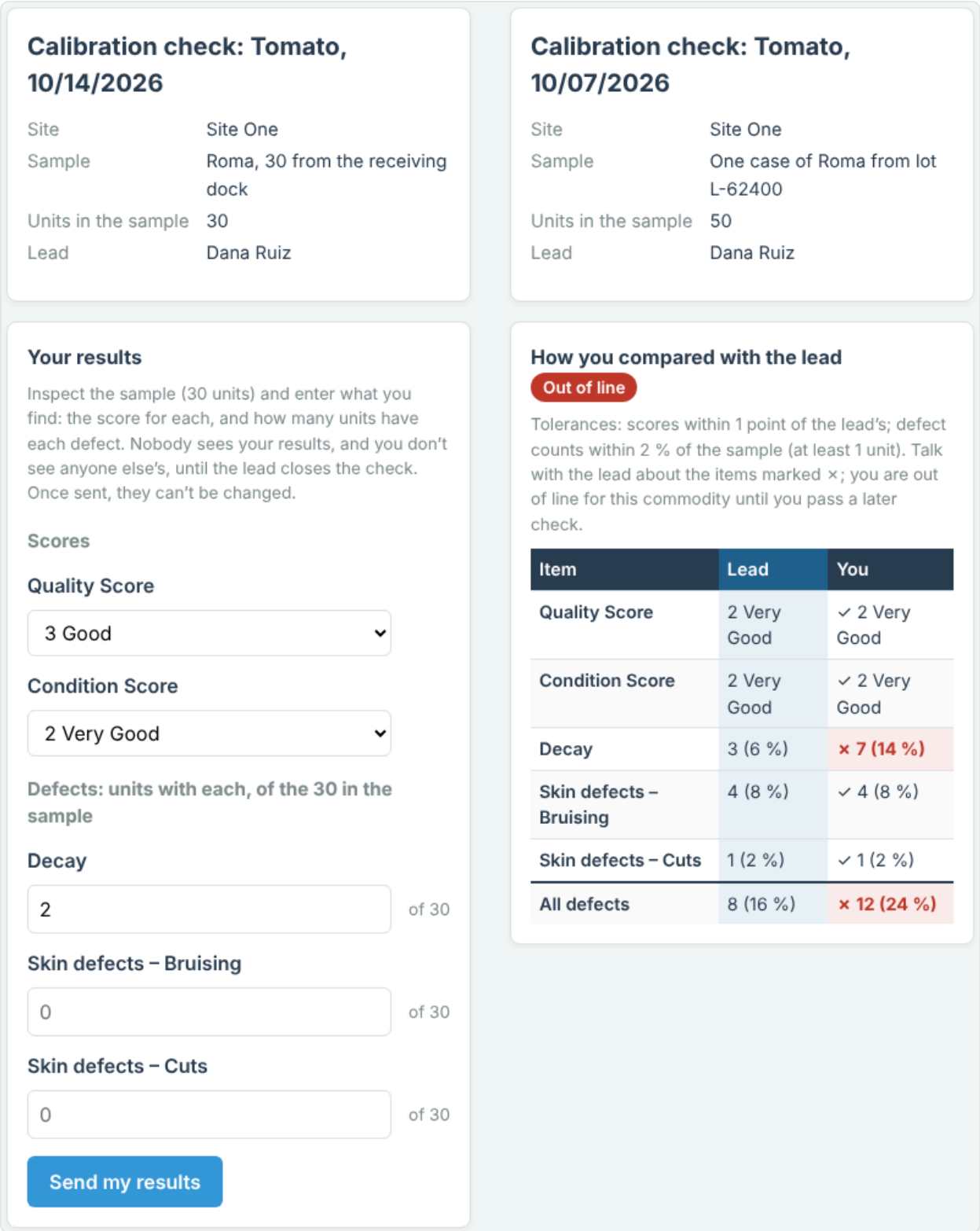
Starting a calibration check

The check's page opens. It shows the link where inspectors enter their results, to write on a board or send. Email the link to those who haven't entered sends it again. The email goes in each inspector's language, from the site's email account.

ENTERING RESULTS

Each inspector inspects the sample, then signs in to Continuum QC on a phone, tablet or computer and opens the link. My Calibration Checks lists the checks they

take part in. Under Your results, they choose the score for each score question, enter how many units have each defect (an empty count is 0), and select Send my results. They don’t need the Inspector Calibration permission.



Entering results on a phone, and how they compared

Nobody sees the others' results, and the inspectors don't see the lead's, until the lead closes the check. Results can't be changed once they are sent.

The lead enters the reference result on the check’s page with Enter the reference result, and types in paper sheets with Enter their paper sheet next to the inspector. Once the reference is in, the lead and the site’s Quality Control Managers see the results so far as a preview; one who takes part sees it only after entering their own.

> **Note:** When results were entered by mistake, Clear (entered by mistake) next to the inspector, with the reason, lets them be entered again. Nobody clears their own results.

CLOSING A CHECK

When everyone has entered, the lead (or a Quality Control Manager) selects Close the check. Each inspector who entered is compared with the lead with the site’s tolerances at that time, and the results are kept; those who didn’t enter don’t count either way. Each inspector then sees their own results against the lead’s, with × on anything outside the tolerance.

Calibration check: Tomato, 10/07/2026 Closed

Site One · started by Dana Ruiz, 10/07/2026 8:00 AM

Sample	One case of Roma from lot L-62400
Units in the sample	50
Lead	Dana Ruiz
What is compared	Quality Score, Condition Score, Decay, Skin defects – Bruising, Skin defects – Cuts
Tolerances	scores within 1 point of the lead's; defect counts within 2 % of the sample (at least 1 unit)
Closed	by Dana Ruiz, 10/07/2026 11:30 AM
Note	Monthly check before the peak.

Taking part (3 of 3 inspectors entered)

Name	Results	Against the lead
Dana Ruiz (lead)	✓ **Entered** 10/07/2026 9:08 AM	Reference
Maria Lopez	✓ **Entered** 10/07/2026 9:10 AM	In line
Sam Carter	✓ **Entered** 10/07/2026 9:12 AM	Out of line Decay 7 (lead 3); All defects 12 (lead 8)
Tomas Reyes	✓ **Entered** 10/07/2026 9:28 AM · from paper, by Dana Ruiz	In line

Results

Item	Lead: Dana Ruiz	Maria Lopez	Sam Carter	Tomas Reyes
Quality Score	2 Very Good	2 Very Good	2 Very Good	2 Very Good
Condition Score	2 Very Good	3 Good	2 Very Good	2 Very Good
Decay	3 (6 %)	3 (6 %)	× 7 (14 %)	4 (8 %)
Skin defects – Bruising	4 (8 %)	5 (10 %)	4 (8 %)	4 (8 %)
Skin defects – Cuts	1 (2 %)	1 (2 %)	1 (2 %)	0 (0 %)
All defects	8 (16 %)	9 (18 %)	× 12 (24 %)	8 (16 %)
Result	Reference	In line	Out of line	In line

× outside the tolerance. Defects: units with the defect, and the % of the sample.

A closed check

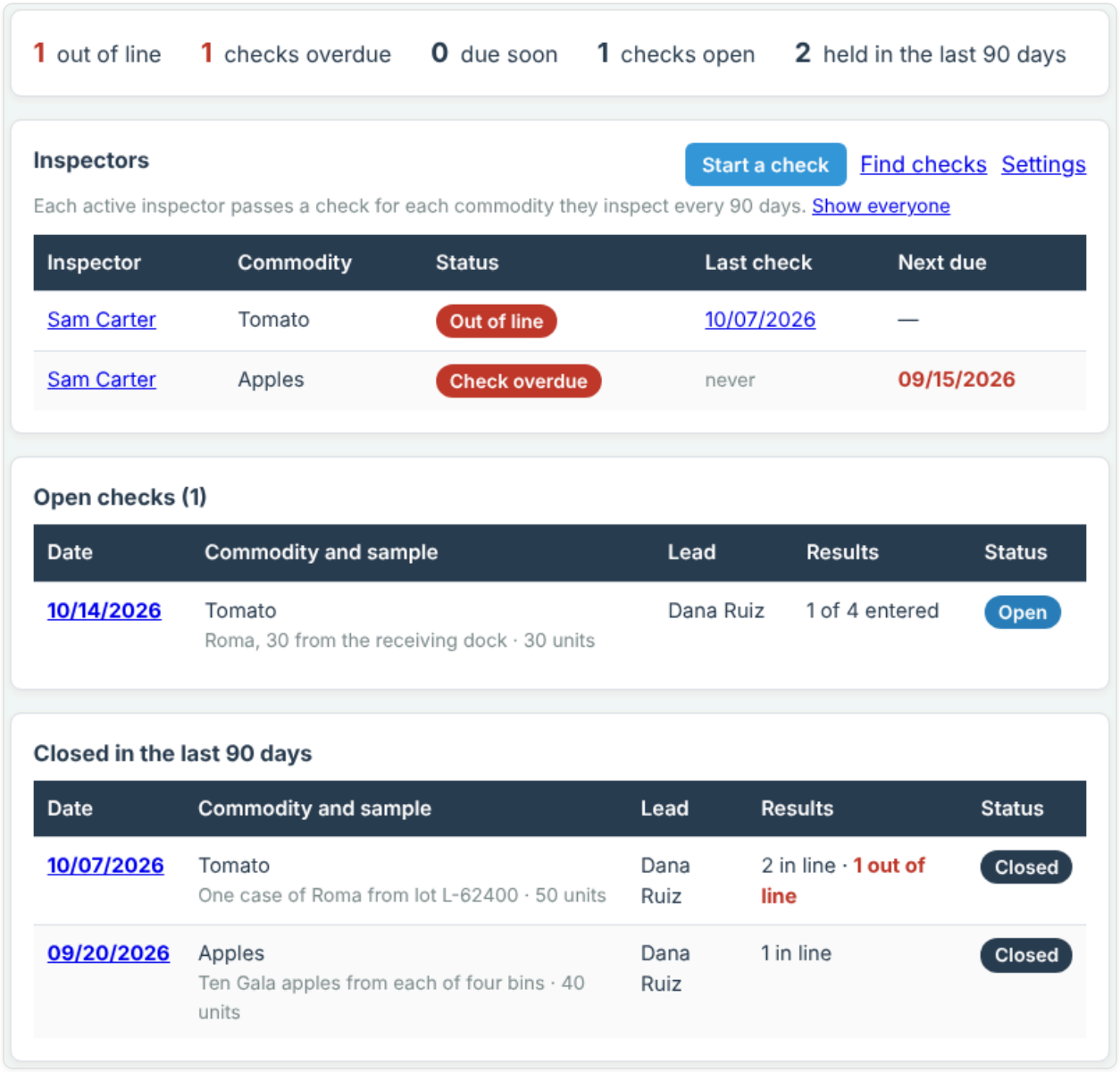
An inspector outside any tolerance is out of line for the commodity. It shows on the list, on their page, on the QA Dashboard and on Trend Alerts until they pass a

later check of that commodity as an inspector. Leading a check counts toward the schedule, but doesn’t clear being out of line.

- Change, on an open check: the date, sample, note and who takes part. Once results are entered, the units, what is compared and the lead stay as they are, and those who entered stay in the check.
- Reopen (to correct an entry), for Quality Control Managers: the check is open again and its results are set aside until it closes again. Since the answers have been shown, those who hadn’t entered can’t enter themselves then, and an entry cleared after it is typed in by the lead or a Quality Control Manager.
- Void (done by mistake), for Quality Control Managers, with the reason: the check stays listed, marked Voided, and no longer counts for anyone.

THE LIST AND EACH INSPECTOR

Growers > Inspector Calibration opens on the site’s list (Quality Control Managers with more than one site choose the Site and select Apply Filter). The counts at the top are the inspectors out of line (for a commodity), the checks overdue and due soon when checks are expected, the checks open, and those held in the last 90 days.



The Inspector Calibration list

Inspectors lists those who need attention: out of line, or with a check overdue or due soon, with the last check and when the next is due. Select Show everyone for every inspector and commodity. Select a name to open the inspector's page, with where they stand for each commodity and every check they took part in. Find checks searches the checks by date, commodity, status and who took part.

- Inspector Training (6.18) shows an inspector's calibration on their page.
- Trend Alerts (6.13) reports inspectors out of line and checks overdue. The QA Dashboard (6.14) has an Inspector calibration tile, the Audit Pack (6.17) a

section with the checks and where each inspector stands, and a management review (6.20) shows the counts.

> **Note:** Give Users the Inspector Calibration permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections) when they start and lead checks; they see it after they next sign in. Inspectors who only take part don't need it. Quality Control Managers have it already; only they reopen and void checks and change the settings. Checks and the settings each have a History.

6.27 Quality Objectives

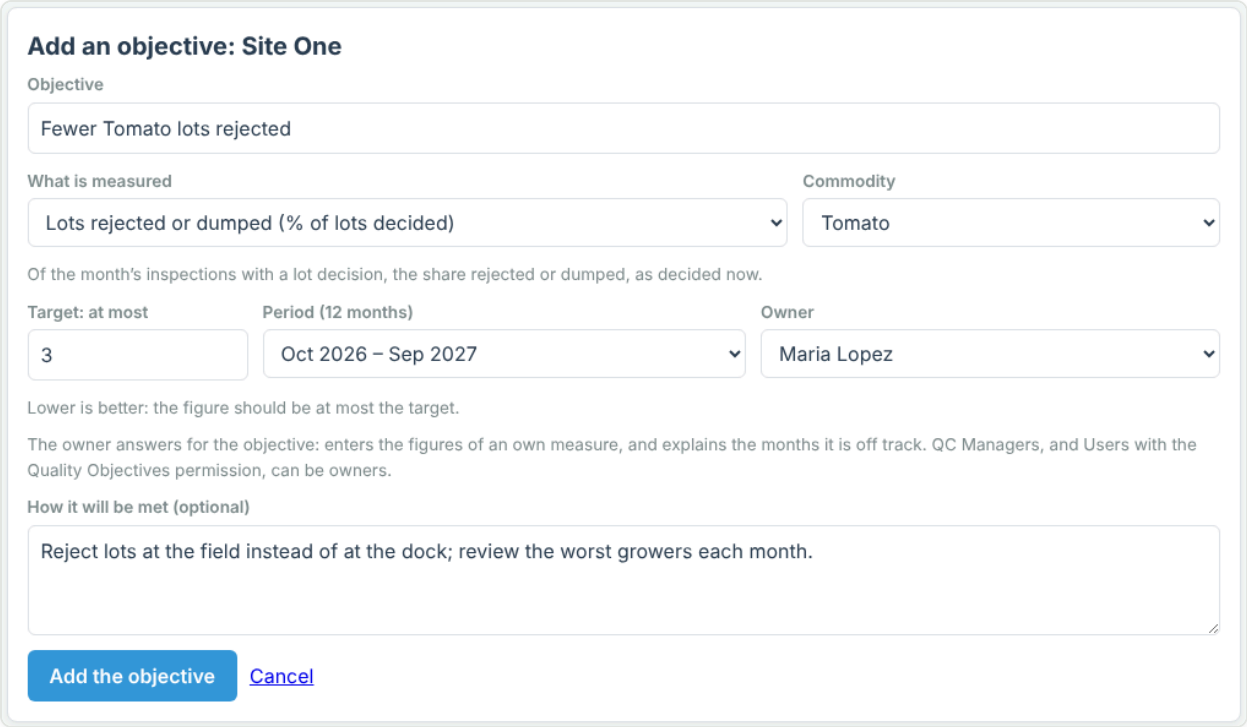
Management > Quality Objectives keeps the site's quality objectives: targets for 12 months on the figures that matter, such as customer claims per 100 inspections or the share of lots rejected, followed month by month. Continuum QC works out most figures itself from what is recorded; others, such as shrink, the owner enters each month. An objective is on track while its figure so far in the 12 months (the year to date) meets the target; when it is off track, its owner says why and what is being done. Standards such as BRCGS, SQF and ISO 9001 expect measurable quality objectives that are followed and reviewed.

ADDING AN OBJECTIVE

Quality Control Managers add objectives:

1. Go to Management > Quality Objectives (choose the Site and select Apply Filter if you have more than one) and select Add an objective.
2. Enter the Objective, such as Fewer customer claims.
3. Choose What is measured: a figure Continuum QC works out (see the list below), for All commodities or one Commodity where it can be told, or your own measure. The hint under it says how a month's figure is worked out.
4. Enter the target. For a figure Continuum QC works out the direction is set: Target: at most where lower is better, such as claims, and Target: at least where higher is better, such as actions done on time.

5. Choose the Period: the 12 months it covers, starting in any month, such as the start of a season or of your fiscal year.
6. Choose the Owner, who answers for it: a Quality Control Manager, or a User with the Quality Objectives permission.
7. If you want, write How it will be met, and select Add the objective.



Adding an objective

The figures Continuum QC works out are those of the features in use at your company:

- Average quality score and Average condition score: the average of the scores of the month's inspections (1 Excellent – 5 Poor).
- Lots rejected or dumped, and Lots held, rejected or dumped at any point (% of lots decided): of the month's inspections with a lot decision (see 6.7).
- Customer claims per 100 inspections, and the Amount credited on customer claims: the claims received in the month (see 6.10).
- Corrective actions done by their due date (%): of those due in the month (see 6.9).

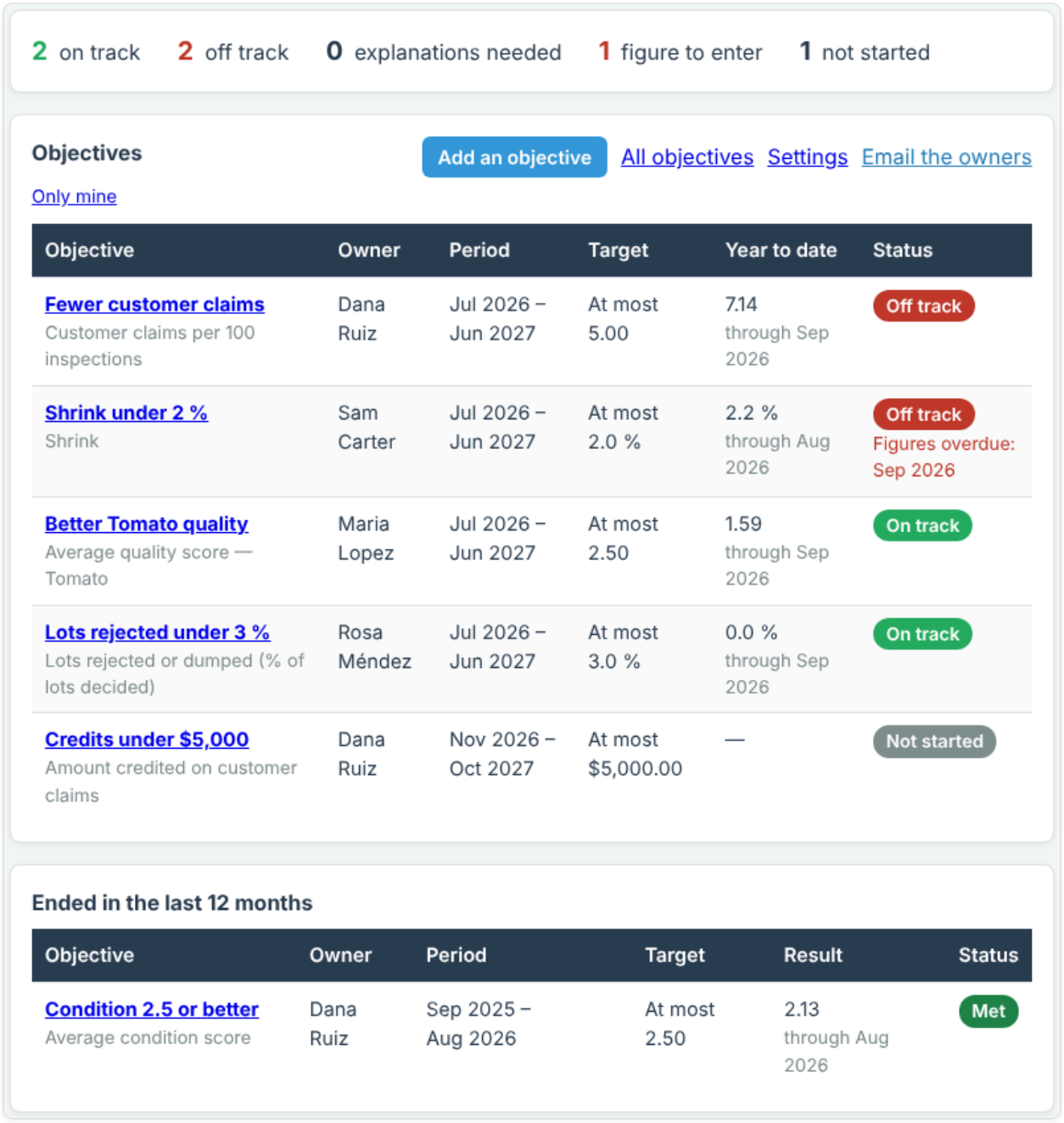
- Calibration checks failed (6.12), Inspections signed off on time (6.16), Inspections by someone not qualified (6.18) and Inspector calibration results out of line (6.26), in %.
- Lots from growers not approved (6.21), Shelf-life samples failed (6.23), Lots sent outside the customer's spec (6.24) and Lots sent without a needed certificate (6.25), in %.

Your own measure, entered each month, is for a figure Continuum QC doesn't keep, such as shrink or loads returned. Enter its Name, its Unit if you want (such as % or loads), whether The year to date is the average of the months (for a rate or share) or the total of the months (for a count or amount), the Decimals shown, and whether the Target is At most or At least.

> **Note:** A total, such as the amount credited or loads returned, is judged against the target's share for the months with figures so far: after 3 months, a quarter of the year's target.

FOLLOWING OBJECTIVES

Management > Quality Objectives opens on the site's list. The counts at the top are the objectives on track and off track, the explanations needed, the figures to enter and those not started. Objectives lists those in progress or not started, off track first, with the owner, the period, the target, the year to date and the status; Ended in the last 12 months shows how the recent ones finished, Met or Missed. Select Only mine for those you own, and All objectives to find any, also those voided.



The Quality Objectives list

Select an objective to open it. Its page shows the year to date as of the latest month that has ended with a figure, against the target, a chart of the months, and the months one by one: each month's figure, with what it is worked out from (such as 2 claims · 13 inspections), the year to date after it, and whether it was on track.

Fewer customer claims

Off track

Measure	Customer claims per 100 inspections The claims received in the month (those rejected or withdrawn left out) per 100 inspections of the month. For one commodity, the claims about its lots.
Target	At most 5.00
Period	Jul 2026 – Jun 2027
Owner	Dana Ruiz
How it will be met	Check pallets before loading; share the claim reasons with growers every week.
Site	Site One

Year to date through September 2026: **7.14** Target: **5.00**



Month	Figure	Year to date	Status	Why, and what is being done
Jul 2026	0.00 0 claims · 4 inspections	0.00	On track	
Aug 2026	0.00 0 claims · 11 inspections	0.00	On track	
Sep 2026	15.38 2 claims · 13 inspections	7.14	Off track	**Why:** Two loads of Roma arrived soft at FreshMart after a long wait at the dock. **Being done:** Loading is now booked with the carrier; pulp temperatures are logged before each load. Dana Ruiz · 10/05/2026 · Change Corrective action CA-7
Oct 2026	26.32 so far 5 claims · 19 inspections	—	In progress	

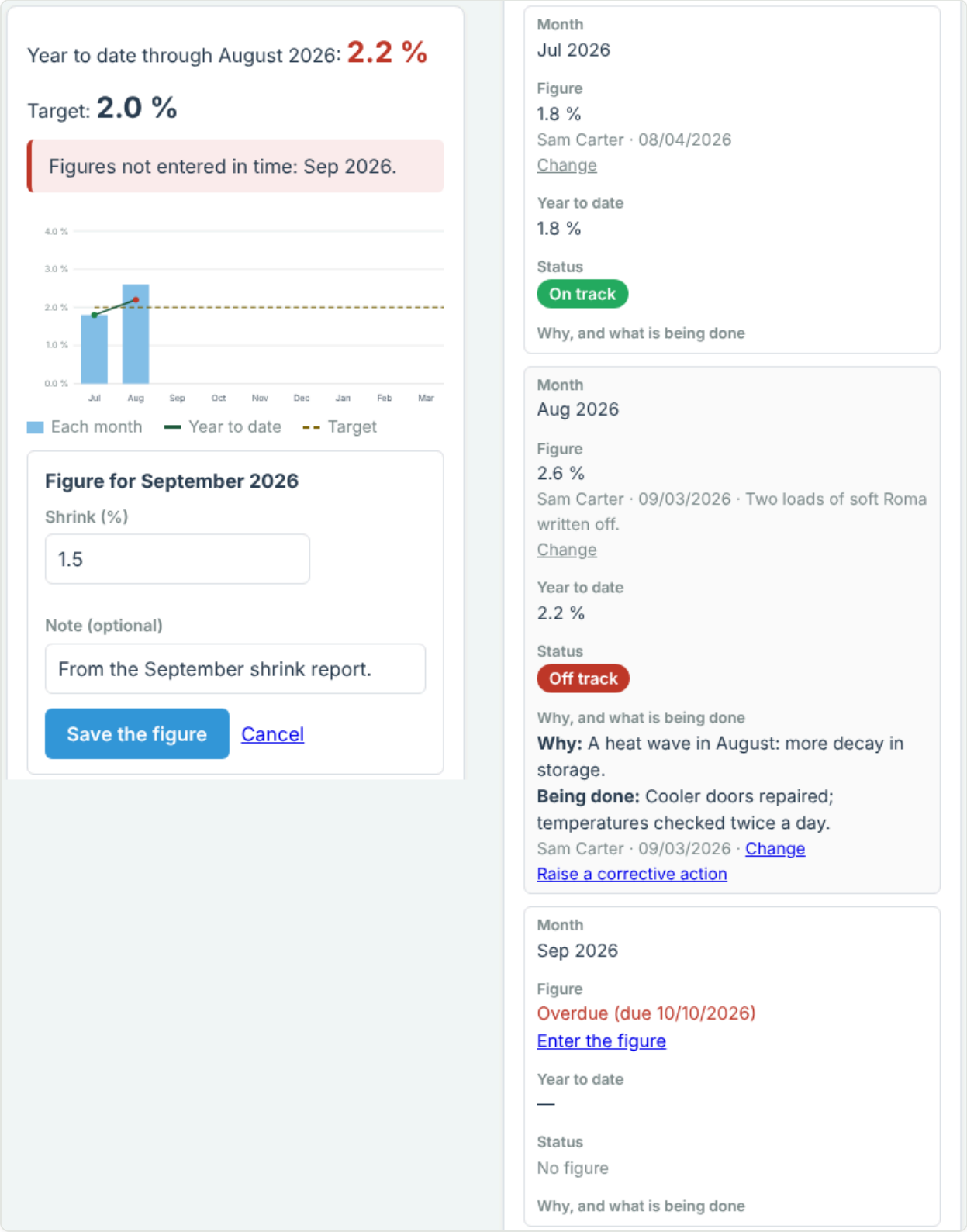
An objective, month by month

- A month counts once it has ended. The month in progress shows its figure so far, but it isn’t counted and isn’t on the chart.

- The year to date takes the months together: the claims of all the months per 100 inspections of all the months, not the average of the monthly figures. It is judged as shown: 2.04 %, shown as 2.0 %, meets a target of at most 2.0 %.
- Figures are worked out from the records as they are now, so a month can still change, for example when a lot is decided or a claim received later.

ENTERING FIGURES

For an objective on your own measure, the owner or a Quality Control Manager enters each month’s figure after the month ends: open the objective, select Enter the figure next to the month, type the figure (and a Note if you want), and select Save the figure. Change, under a figure, corrects it.

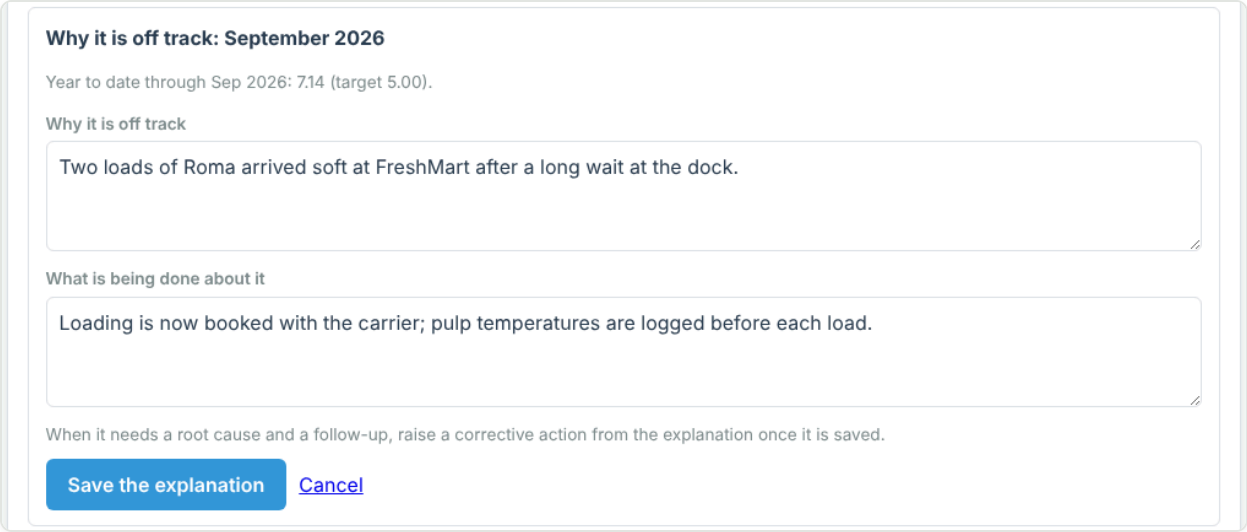


Entering a figure on a phone, and the months

A figure is due 10 days after its month ends (see Settings below); after that it shows as Overdue, and the list shows Figures overdue under the objective.

WHEN AN OBJECTIVE IS OFF TRACK

When the latest month with a figure is off track, the objective asks its owner to explain. The owner, or a Quality Control Manager, selects Explain next to the month, writes Why it is off track and What is being done about it, and selects Save the explanation.



Explaining why an objective is off track

The explanation shows on the month. When it needs a root cause and a follow-up, select Raise a corrective action under it: the corrective action form is filled in from it, with the source Quality objective (see 6.9), and the two are linked. Each month that is off track asks for its own explanation.

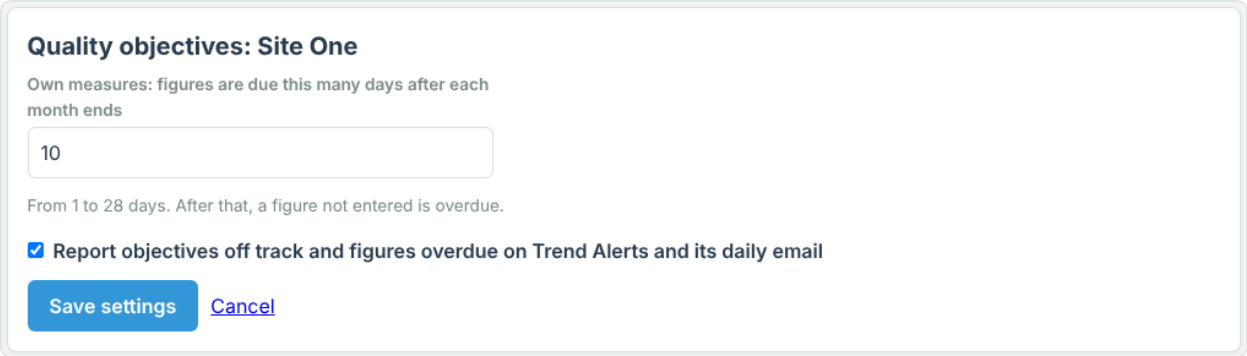
CHANGING AN OBJECTIVE

- Change, for Quality Control Managers: the objective, the owner, How it will be met and the target. Once a month has ended, say Why the target changes; it is kept in the History. What is measured, the commodity, the period and the direction can change only until a month has ended or figures or explanations are in.
- Set the next 12 months from this one: starts a new objective filled in from it, for the 12 months after it.
- Void (no longer pursued, or added by mistake), for Quality Control Managers, with the reason: it stays listed, marked Voided, and is no longer followed or reported.

- Email the owners, on the list, for Quality Control Managers: each owner gets the figures they have to enter and the explanations needed, in their language, from the site's email account.

SETTINGS

Settings, which Quality Control Managers change: how many days after a month ends the figures of own measures are due (10 to start with), and whether objectives off track and figures not entered in time are reported on Trend Alerts and its daily email.



Quality objective settings

- Trend Alerts (6.13) reports objectives off track and figures not entered in time.
- The QA Dashboard (6.14) has a Quality objectives tile, the Audit Pack (6.17) a section with each objective and the months off track, and a management review (6.20) a Quality objectives topic.

> **Note:** Give Users the Quality Objectives permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections) when they own objectives or should see them; they see it after they next sign in. Everyone with it sees all the site's objectives. Quality Control Managers have it already; only they add, change and void objectives, email the owners and change the settings. Objectives and the settings each have a History.

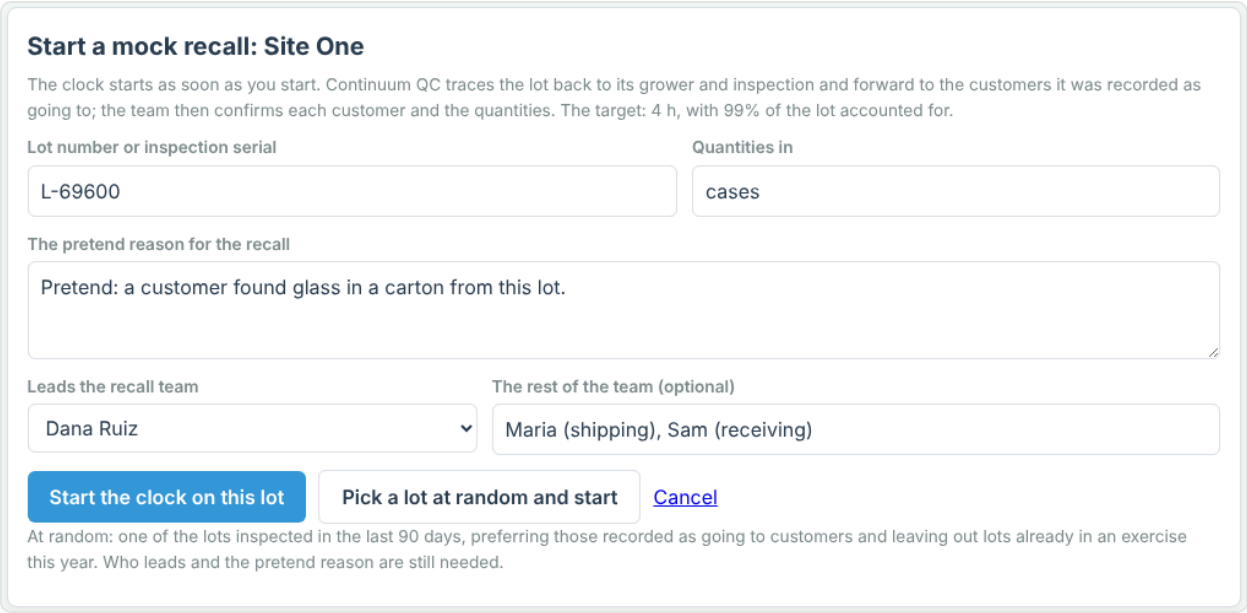
6.28 Mock Recalls

Problems > Mock Recalls runs mock recalls: timed exercises on one lot, as if it had to be recalled. Continuum QC traces the lot at once, back to its grower and inspection and forward to the customers it was recorded as going to; the recall team confirms each customer and the quantities, and the clock stops when the whole lot is accounted for. Food safety standards such as BRCGS and SQF expect the recall procedure to be tested at least once a year, with how long it took and how much of the product was found.

STARTING A MOCK RECALL

Quality Control Managers start mock recalls:

1. Go to Problems > Mock Recalls (choose the Site and select Apply Filter if you have more than one) and select Start a mock recall.
2. Enter the Lot number or inspection serial (the lot numbers inspected at the site in the last two years are suggested as you type), and what the quantities are counted in under Quantities in, such as cases.
3. Write The pretend reason for the recall, such as a customer finding glass in a carton.
4. Choose who Leads the recall team and, if you want, enter The rest of the team.
5. Select Start the clock on this lot. To test the team on a lot nobody expects, select Pick a lot at random and start instead: Continuum QC picks one of the lots inspected in the last 90 days, preferring those recorded as going to customers and leaving out lots already in an exercise this year.

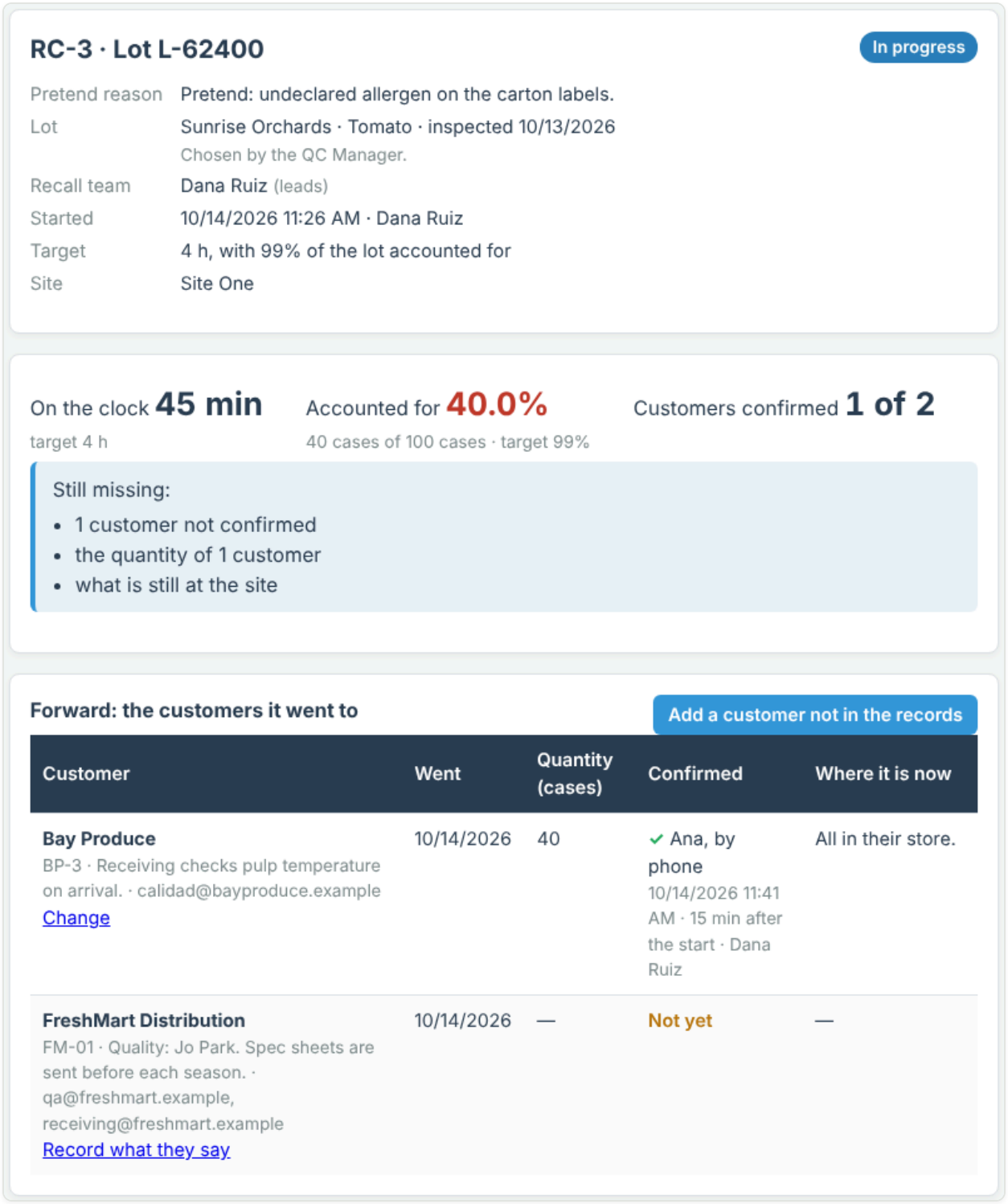


Starting a mock recall

The clock starts at once. You can also start one from a lot: select Start a mock recall under the inspection on Edit Quality Inspections (6.6). A lot with an exercise in progress isn't started again: that exercise opens instead.

TRACING THE LOT

The exercise opens on its page. At the top are the time On the clock against the target, the share of the lot Accounted for, the Customers confirmed and what is Still missing.



A mock recall in progress

Forward: the customers it went to has one line for each record of the lot going to a customer on Customer Specifications (6.24), by hand or on a shipment (6.70), with the day it went, the customer's code, note and certificate emails (who to call),

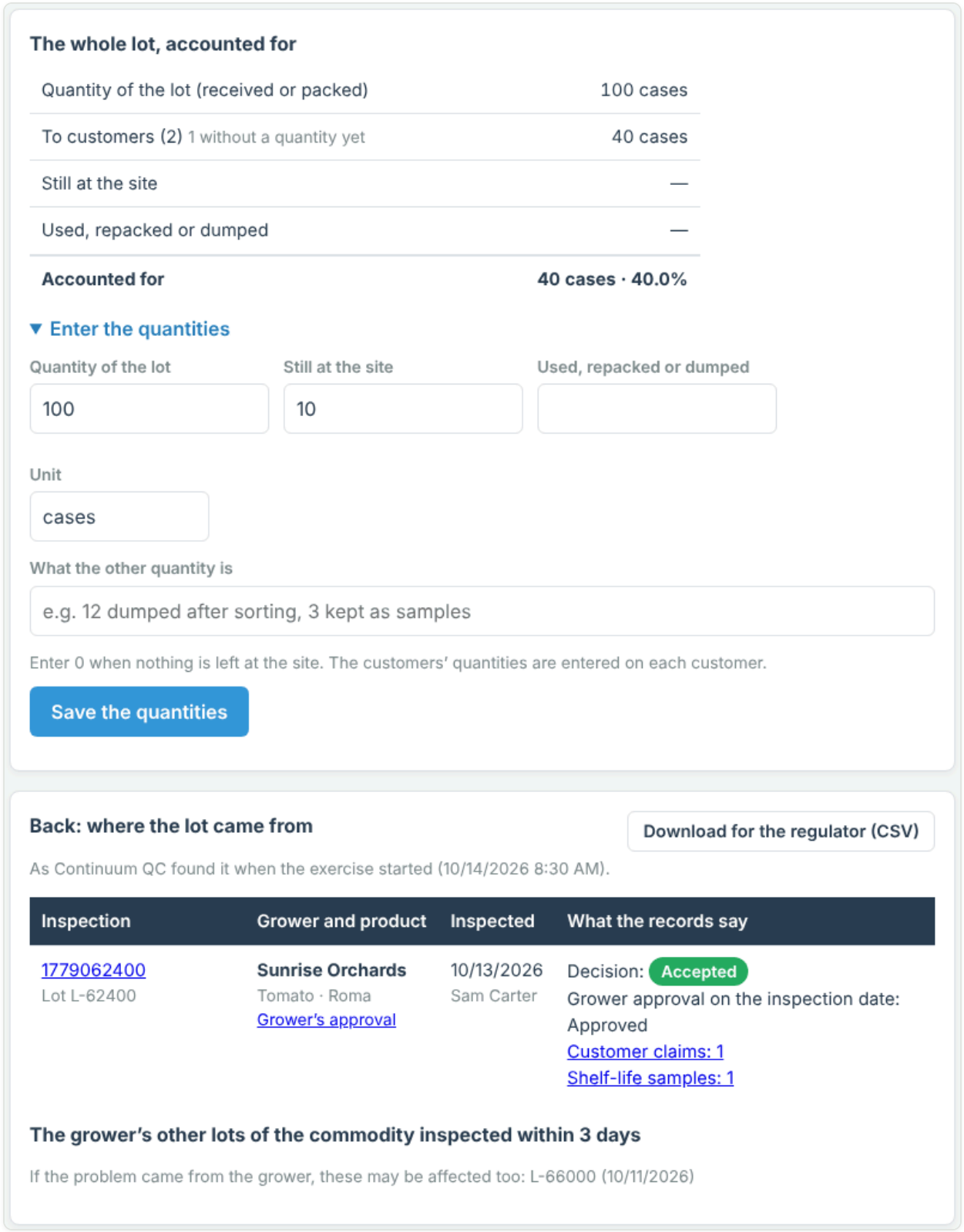
and its quality certificate (6.25); a lot sent to the same customer on two shipments has two lines.

When the lot number is also the lot's traceability lot code on Traceability Events (see 6.61), the exercise also reads the lot's traceability events when it starts, at the site and the company's other sites you have. Back: where the lot came from lists them under In the traceability records (the day, the event, the lot code, the quantity, who it was shipped to, the site and the event number). And each shipment there to a customer or another business that Customer Specifications doesn't have is a line too, marked From the traceability records: shipments of the lot, and of the lots made from it by a transformation, from any of those sites. A shipment to another of the company's sites isn't a line: that site's shipments of the lot are. In the file for the regulator, the Reference of such a line is Traceability records.

> **Note:** Download for the regulator (CSV), at the top of the trace, makes the trace one file to send to the regulator: the CFIA (SFCR, section 91) and the FDA (FSMA 204) can ask for a food's traceability records within 24 hours, as one plain-text file a spreadsheet opens and sorts. The file, named for the lot and the day (Trace L-58800 2026-10-14.csv), has one row per step: each inspection of the lot as Received from its grower, each customer as Shipped to with the quantity confirmed and who to call, what is still At the site, and what was Used, repacked or dumped, with the commodity, the dates, the references (inspection, Customer Specifications record, quality certificate) and the site. It opens in Excel or any spreadsheet program; a typed text that would start a formula is kept as text. Everyone who can open the exercise can download it, and each download is recorded in its history.

Back: where the lot came from shows what Continuum QC found when the exercise started: the lot's inspections (every inspection at the site with the same lot number within 30 days), the grower, the lot's decision, the grower's approval and certificates on the inspection date, and the lot's claims, corrective actions and shelf-life samples. Below them are the grower's other lots of the commodity

inspected within 3 days, which may be affected too if the problem came from the grower. Each part shows to those who can see it on its own page.

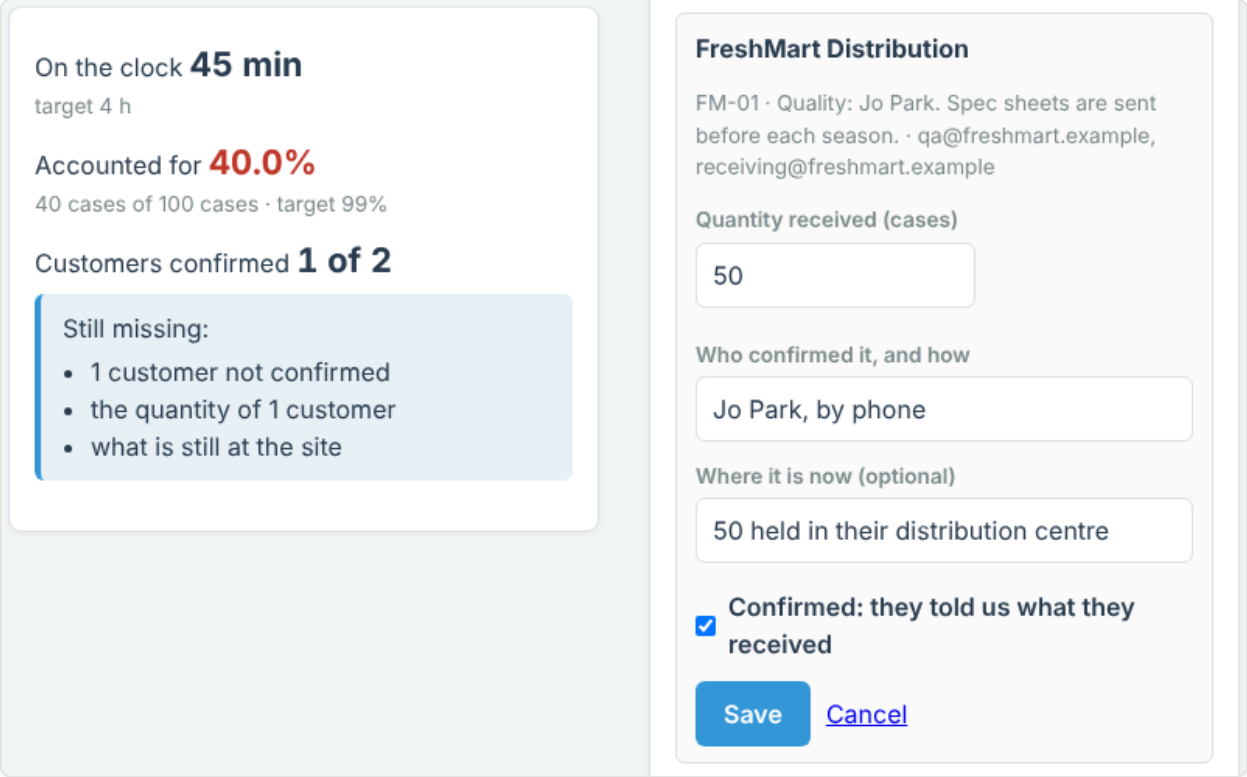


The whole lot, and where it came from

CONFIRMING EACH CUSTOMER

The recall team, everyone with the Mock Recalls permission at the site, works on the exercise at the same time, on a computer or a phone:

1. Select Record what they say under the customer.
2. Enter the Quantity received, Who confirmed it, and how (such as Jo Park, by phone) and, if you want, Where it is now (such as held in their cold store).
3. Tick Confirmed: they told us what they received, and select Save.



What is still missing, and confirming a customer on a phone

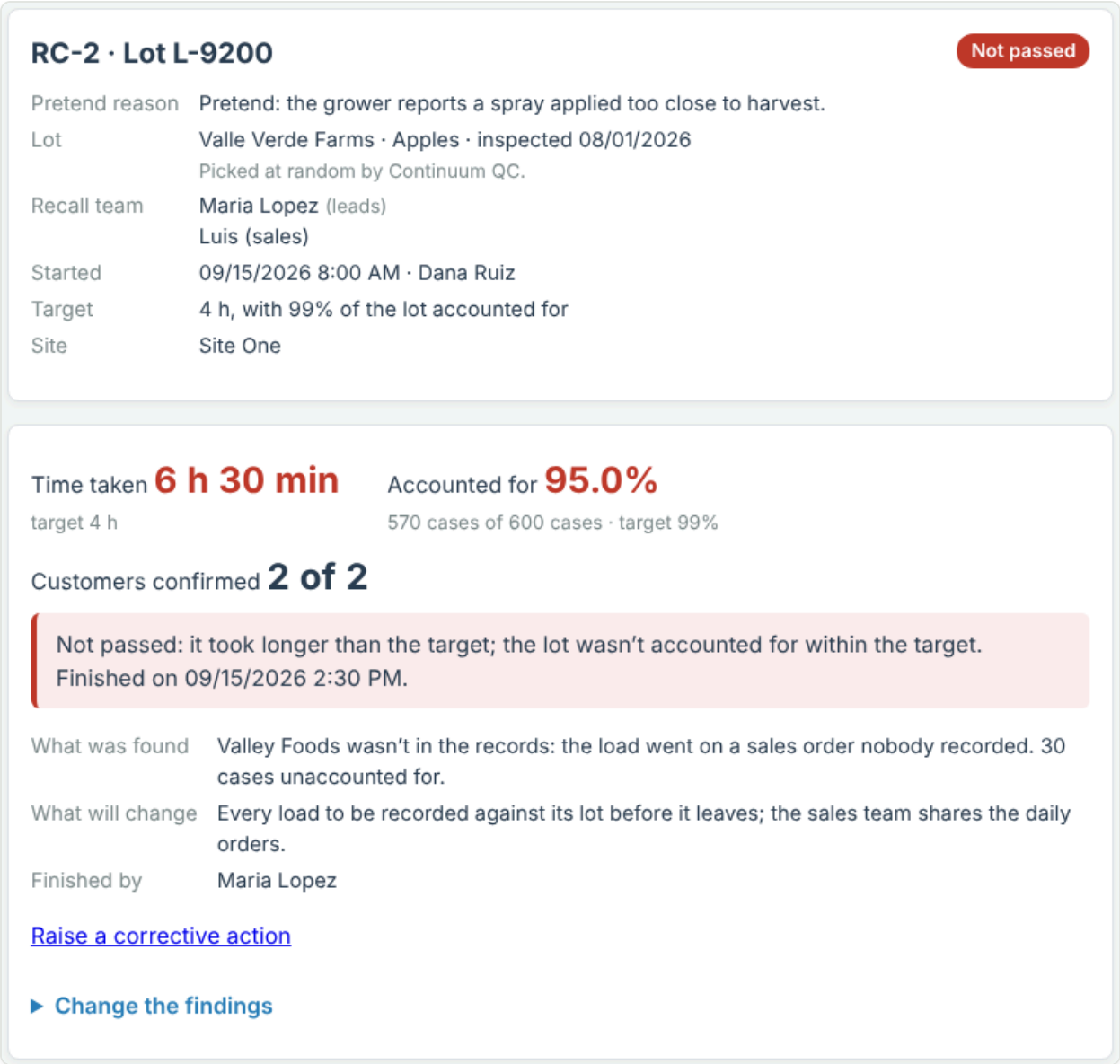
Each confirmation keeps its time, and how long after the start it came. For a customer the records didn't have, select Add a customer not in the records and enter it the same way: it counts like the others, and shows as a finding, Not in the records: added by the team. Only those can be removed, when added by mistake.

Under The whole lot, accounted for, select Enter the quantities: the Quantity of the lot (received or packed), what is Still at the site (enter 0 when nothing is left), and what was Used, repacked or dumped, with what it is. The share accounted for is the customers' quantities and those together, against the lot.

> **Note:** The clock stops when every customer is confirmed and the share accounted for is within the target: at 99%, from 99% to 101%, since more than the lot is a discrepancy too. A later change to a quantity or a confirmation moves the stop to that change; a change that leaves something missing makes the clock run again.

FINISHING A MOCK RECALL

The team leader, or a Quality Control Manager, finishes the exercise under Finish the exercise, with What was found (what went well, what didn't) and What will change, and selects Finish the exercise. It passes when the clock stopped within the target time. When it doesn't pass, both texts are needed; with something still missing, tick Finish anyway, and it is recorded as not passed.

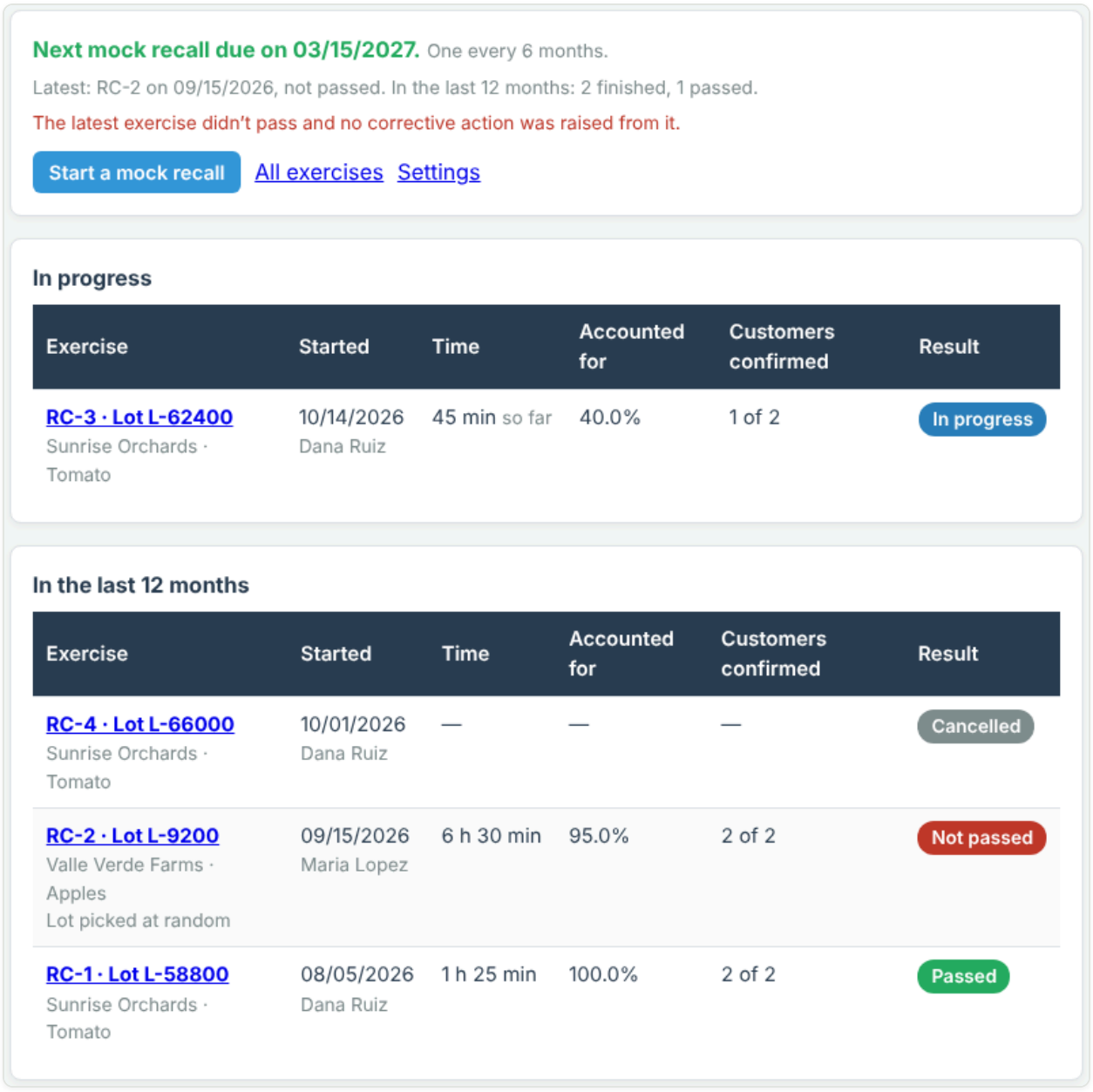


A mock recall that didn't pass

- Once finished, the customers and quantities can't change any more; Change the findings can.
- Raise a corrective action makes a corrective action from the exercise, filled in from its result and findings, with the source Mock recall (see 6.9).
- Cancel the exercise, for Quality Control Managers, with the reason, for one started by mistake or not to be counted: it stays listed, marked Cancelled, and no longer counts.

> **Note:** For a real recall, use Problems > Recalls (see 6.39): it traces the lots the same way, and tells the customers.

Problems > Mock Recalls opens on when the next exercise is due and the latest result, then the exercises in progress and those of the last 12 months, with the time each took, the share accounted for, the customers confirmed and the result. All exercises finds any, also those cancelled.

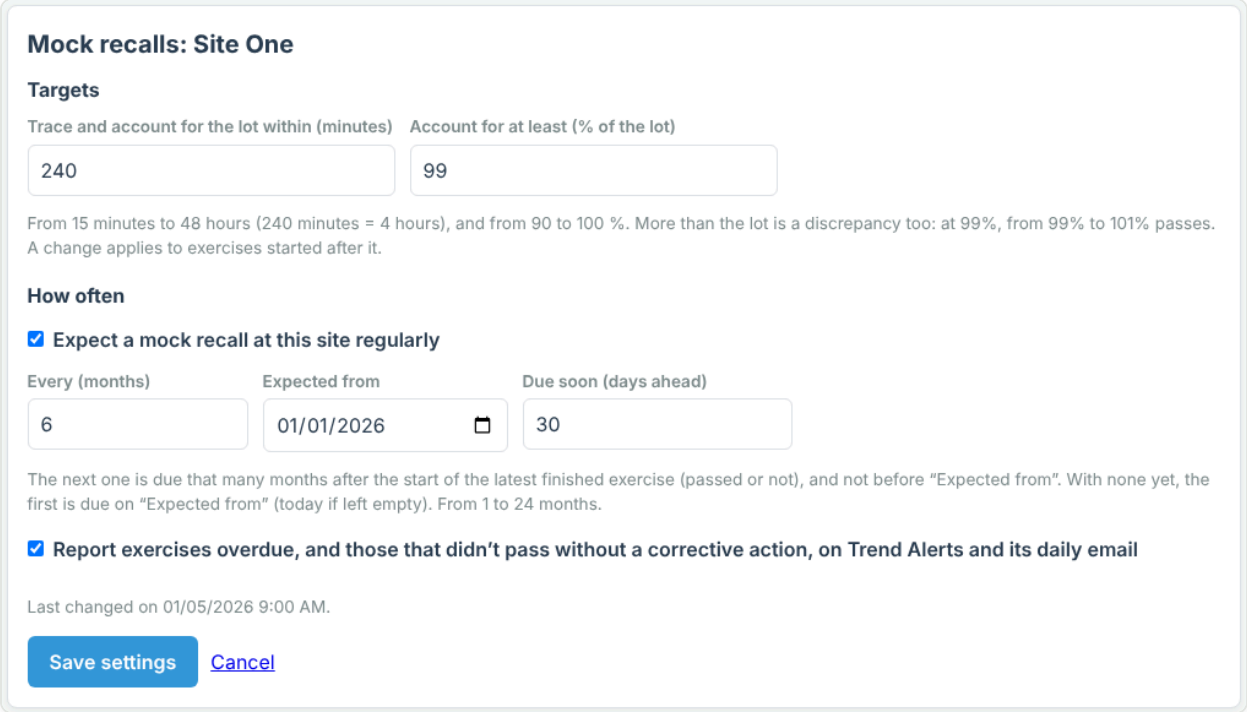


The Mock Recalls list

SETTINGS

Settings, which Quality Control Managers change: the targets (the time to trace and account for the lot, 4 hours to start with, and the share of the lot to account for, 99%), and whether a mock recall is expected Every so many months (6 to start with; at a site in Canada, every 12 months). The next one is due that long after the start of the latest finished exercise, passed or not, and not before Expected from; with none yet, the first is due on Expected from. A change to the targets applies to exercises started after it.

> **Note:** At a site in Canada a recall simulation is required at least once every 12 months (Safe Food for Canadians Regulations, section 84): the schedule is always on, Every 12 months at most, and the page says so, with the box ticked and greyed. Saving it off, or more than 12 months, is refused with the reason. A site in Canada whose settings were never saved expects one every 12 months, the first one due today. The country is set for each site in QA Setup (6.32).



Mock recall settings

- Trend Alerts (6.13) reports an exercise overdue, no exercise finished in the last 12 months (at a site in Canada, or a site that expects them on a schedule), and the latest one not passed without a corrective action. QA Setup (6.32) lists a mock recall still to do when none has been finished in the last 12 months: required at a site in Canada, recommended at a US site, as the audit schemes (GFSI) ask for one a year.
- The QA Dashboard (6.14) has a Mock recalls tile, the Audit Pack (6.17) a section with the exercises, and a management review (6.20) a Traceability and mock recalls topic.

> **Note:** Give Users the Mock Recalls permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections) when they are on the recall team, such as shipping, sales and receiving; they see it after they next sign in. Quality Control Managers have it already; only they start and cancel exercises and change the settings. Exercises and the settings each have a History.

6.29 Internal Audits

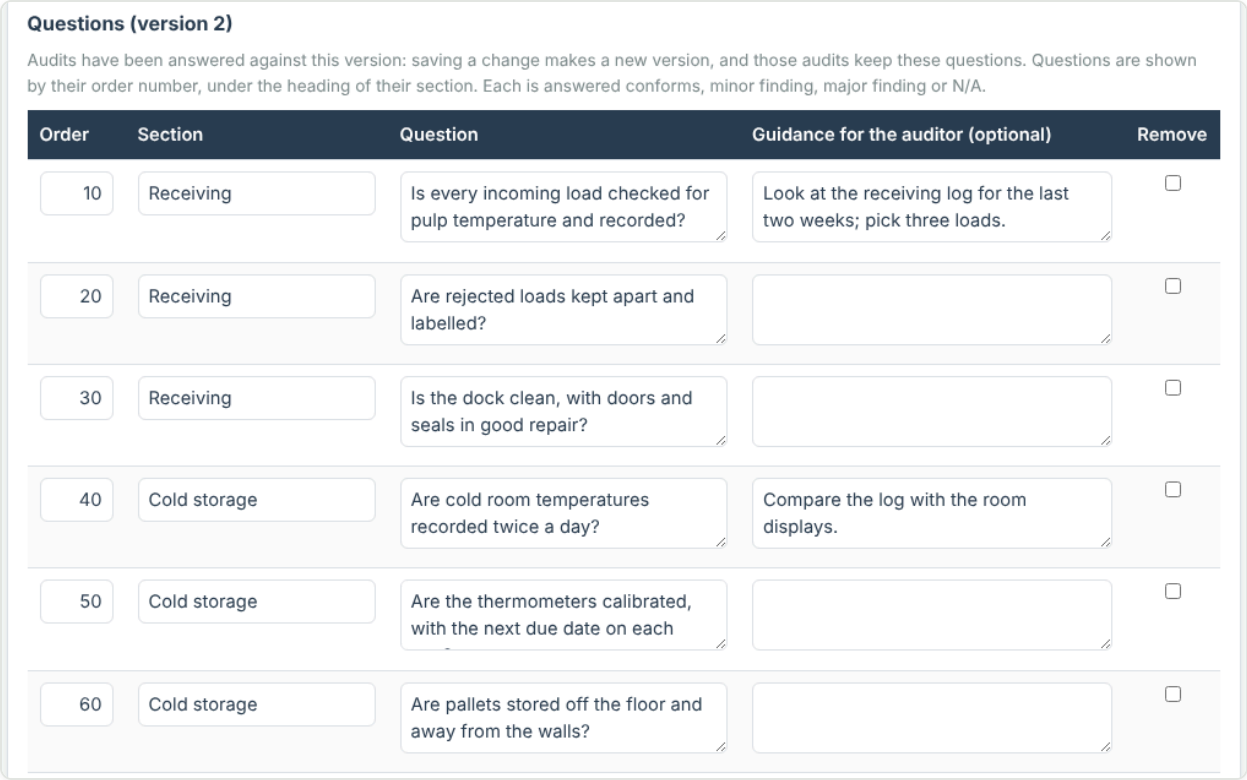
Management > Internal Audits runs the site's internal audits against its own checklists. Quality Control Managers build the checklists and put each one on an audit plan; an auditor answers every question of the checklist, and each finding gets an owner and a due date and is followed up until it is closed. Standards such as ISO 9001, BRCGS, SQF and PrimusGFS expect internal audits on a plan, by auditors independent of the area, with the findings followed up.

CHECKLISTS

Quality Control Managers build each site's checklists, one for each area or process to audit:

1. Go to Management > Internal Audits, select Checklists, then New checklist.
2. Enter the Name and, if you want, What it covers. To put it on the audit plan, enter Audit every (months) and Planned from. To start from another checklist, also one of another site, choose it under Start from a copy of.

3. Select Create the checklist.
4. In the table of questions, enter each question's Order, Section and Question and, if you want, Guidance for the auditor: what to look at. Select More rows for more empty rows.
5. Select Save the questions.



Questions (version 2)

Audits have been answered against this version: saving a change makes a new version, and those audits keep these questions. Questions are shown by their order number, under the heading of their section. Each is answered conforms, minor finding, major finding or N/A.

Order	Section	Question	Guidance for the auditor (optional)	Remove
10	Receiving	Is every incoming load checked for pulp temperature and recorded?	Look at the receiving log for the last two weeks; pick three loads.	☐
20	Receiving	Are rejected loads kept apart and labelled?		☐
30	Receiving	Is the dock clean, with doors and seals in good repair?		☐
40	Cold storage	Are cold room temperatures recorded twice a day?	Compare the log with the room displays.	☐
50	Cold storage	Are the thermometers calibrated, with the next due date on each		☐
60	Cold storage	Are pallets stored off the floor and away from the walls?		☐

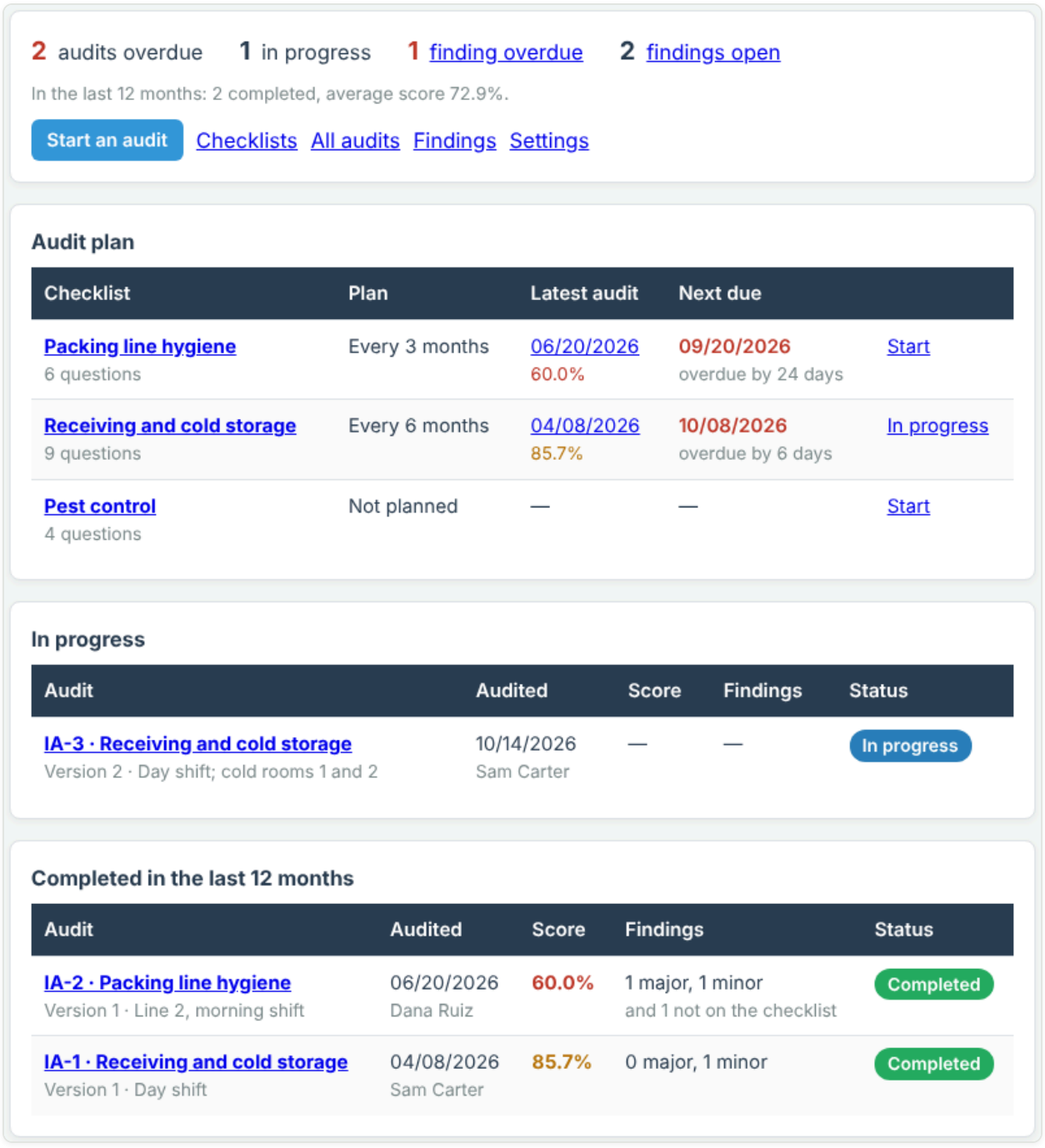
A checklist's questions

Questions are shown in the order of their numbers, under the heading of their section. To move a question, change its number; to remove one, tick Remove; an empty row is left out. A checklist has up to 150 questions.

> **Note:** While no audit has used a checklist's questions, changes are saved in the same version. Once an audit has used them, saving a change makes a new version, with What changed if you write it, and every audit keeps the questions it was answered against. The Versions table lists them; select a version's number to read its questions. Change the details and the plan changes the name, the plan, and whether the checklist is In use: one no longer used keeps its audits.

THE AUDIT PLAN

Management > Internal Audits opens on the counts (audits overdue, in progress, findings overdue and open, and those that are yours), then the Audit plan: each checklist in use with how often it is audited, its latest audit and score, and when the next one is due, in red when overdue. Below are the audits in progress and those completed in the last 12 months.



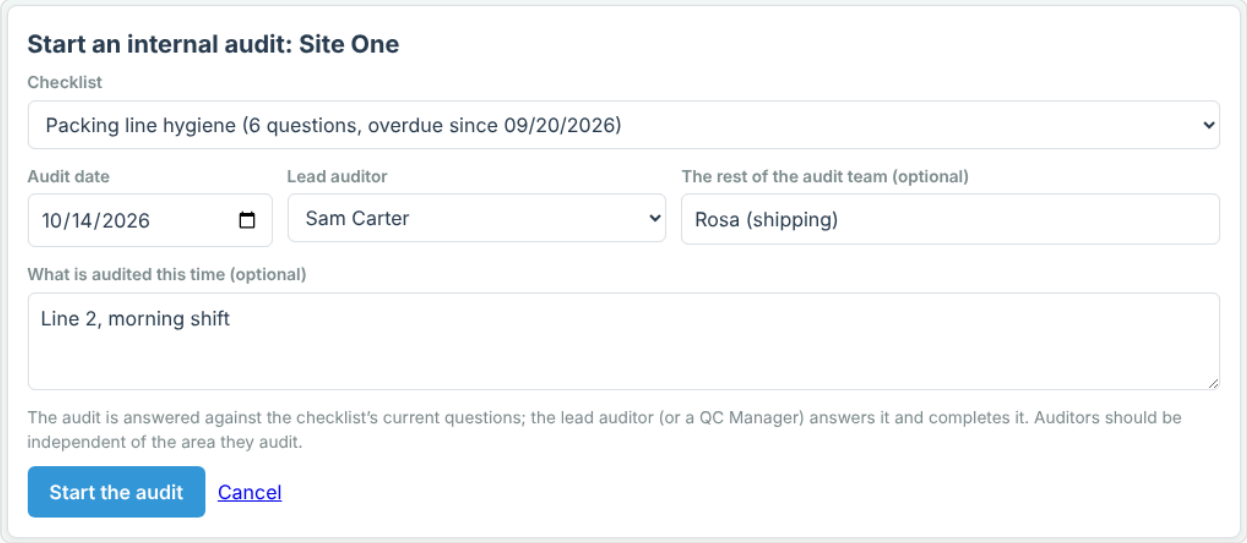
Internal audits and the audit plan

A checklist with Audit every so many months is due that long after its latest completed audit, and not before Planned from; with none completed yet, it is due on Planned from. It is due soon 14 days before (in the settings).

STARTING AN AUDIT

Quality Control Managers start audits:

1. Select Start an audit, or Start next to a checklist on the plan.
2. Choose the Checklist, the Audit date (today or earlier) and the Lead auditor (anyone with the Internal Audits permission).
3. If you want, enter The rest of the audit team and What is audited this time, such as a shift or some of the rooms.
4. Select Start the audit.



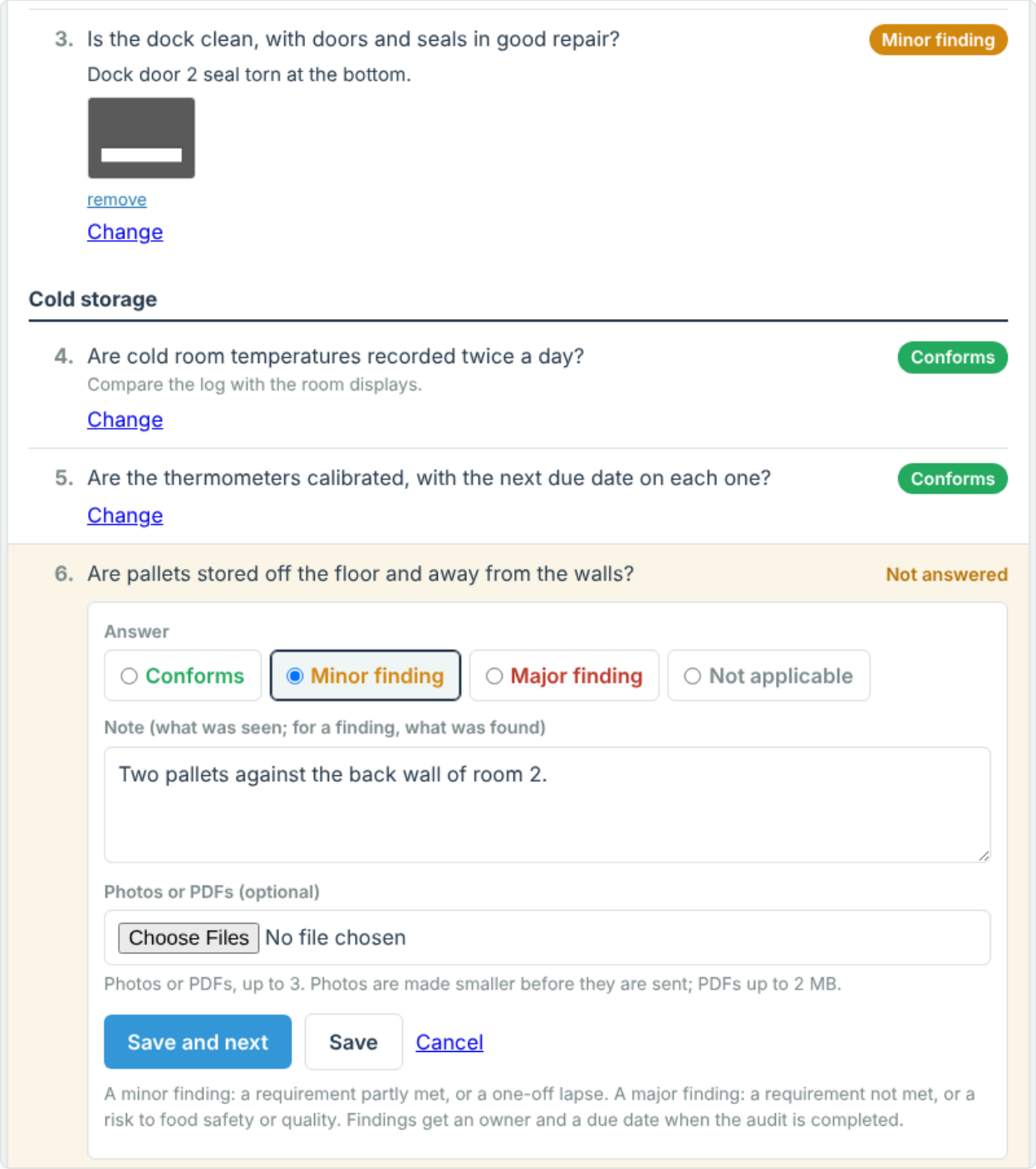
Starting an internal audit

The audit is answered against the checklist's current questions. A checklist has one audit in progress at a time: starting another opens the one in progress.

ANSWERING THE QUESTIONS

The lead auditor, or a Quality Control Manager, answers each question, on a computer or a phone:

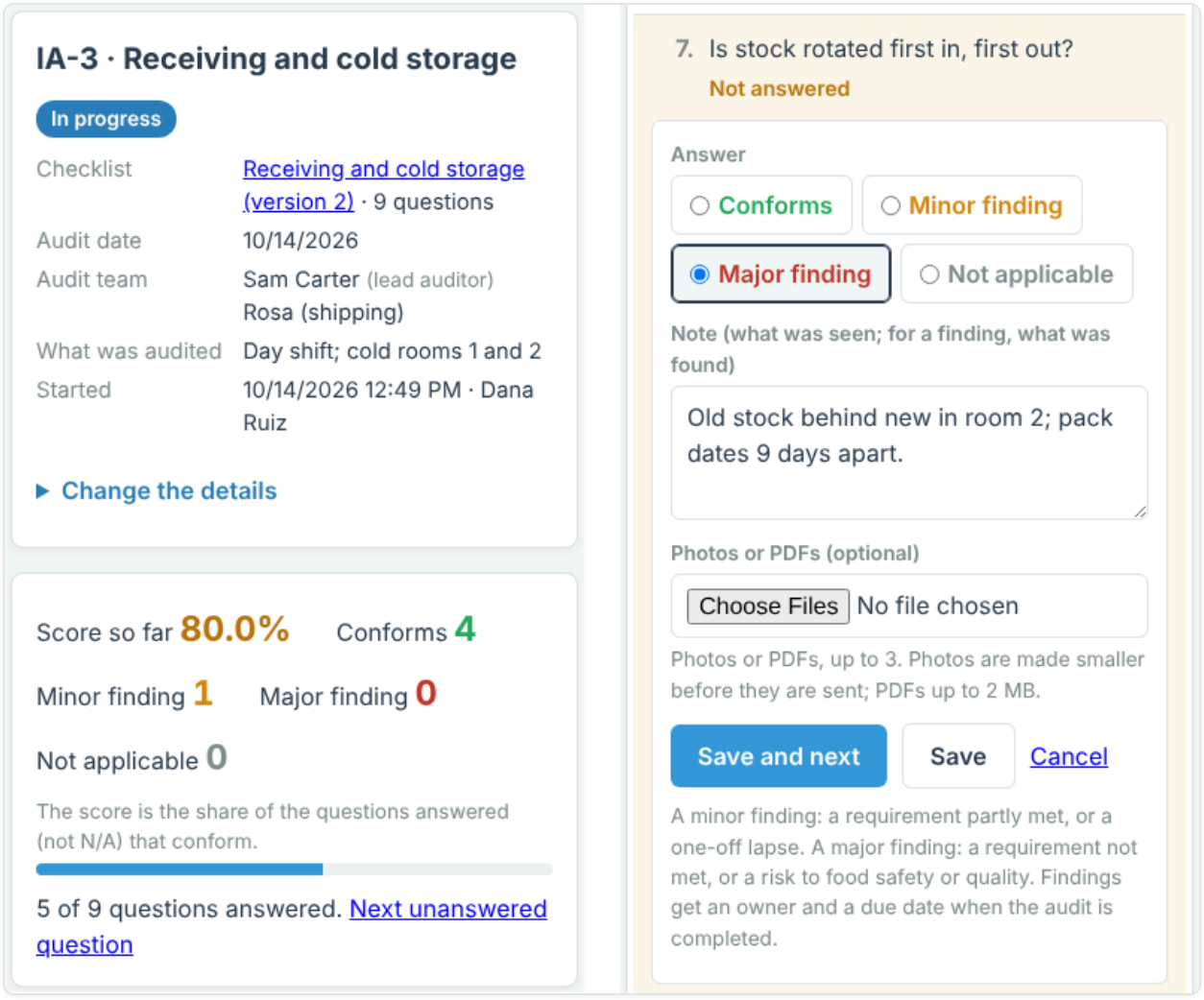
1. Select Start answering (or Next unanswered question), or Answer under a question.
2. Choose Conforms, Minor finding, Major finding or Not applicable.
3. Write a Note: what was seen, and for a finding, what was found (it is needed then).
4. If you want, add Photos or PDFs (up to 3). Photos are made smaller before they are sent.
5. Select Save and next to go on to the next question not answered, or Save.



Answering a question

- A minor finding is a requirement partly met, or a one-off lapse; a major finding is a requirement not met, or a risk to food safety or quality.
- The score is the share of the questions answered, leaving out N/A, that conform. It shows at the top with the counts and how many questions are answered.

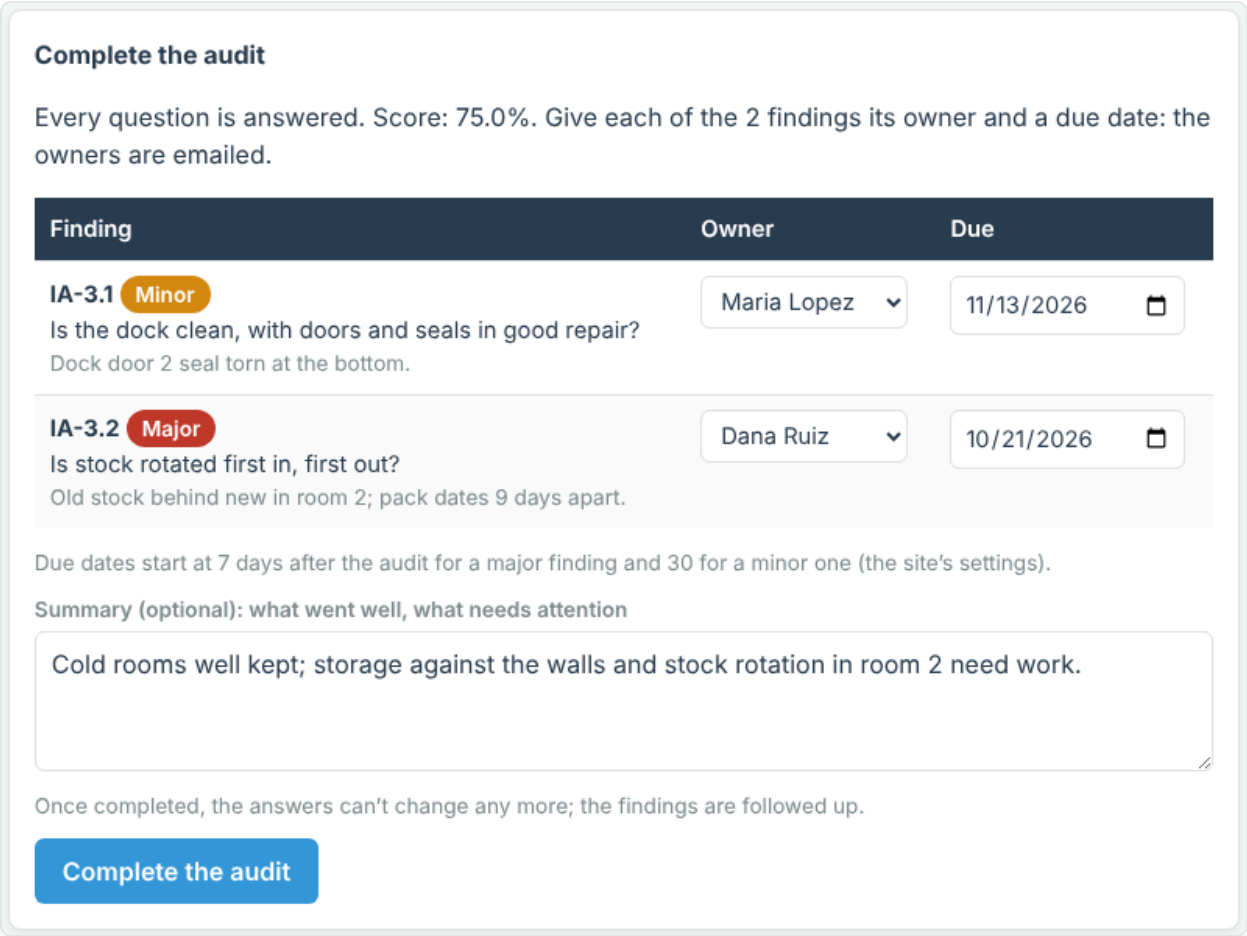
- Raise a finding not on the checklist records something no question covers: what it is about, minor or major, what was found and photos.
- Until the audit is completed, any answer can be changed, and a photo removed. Change the details changes the date, the team and what is audited (and, for Quality Control Managers, the lead auditor).



An audit on a phone

COMPLETING AN AUDIT

When every question is answered, the lead auditor or a Quality Control Manager completes the audit under Complete the audit: choose each finding's Owner and Due date, write a Summary if you want, and select Complete the audit.



Completing an audit

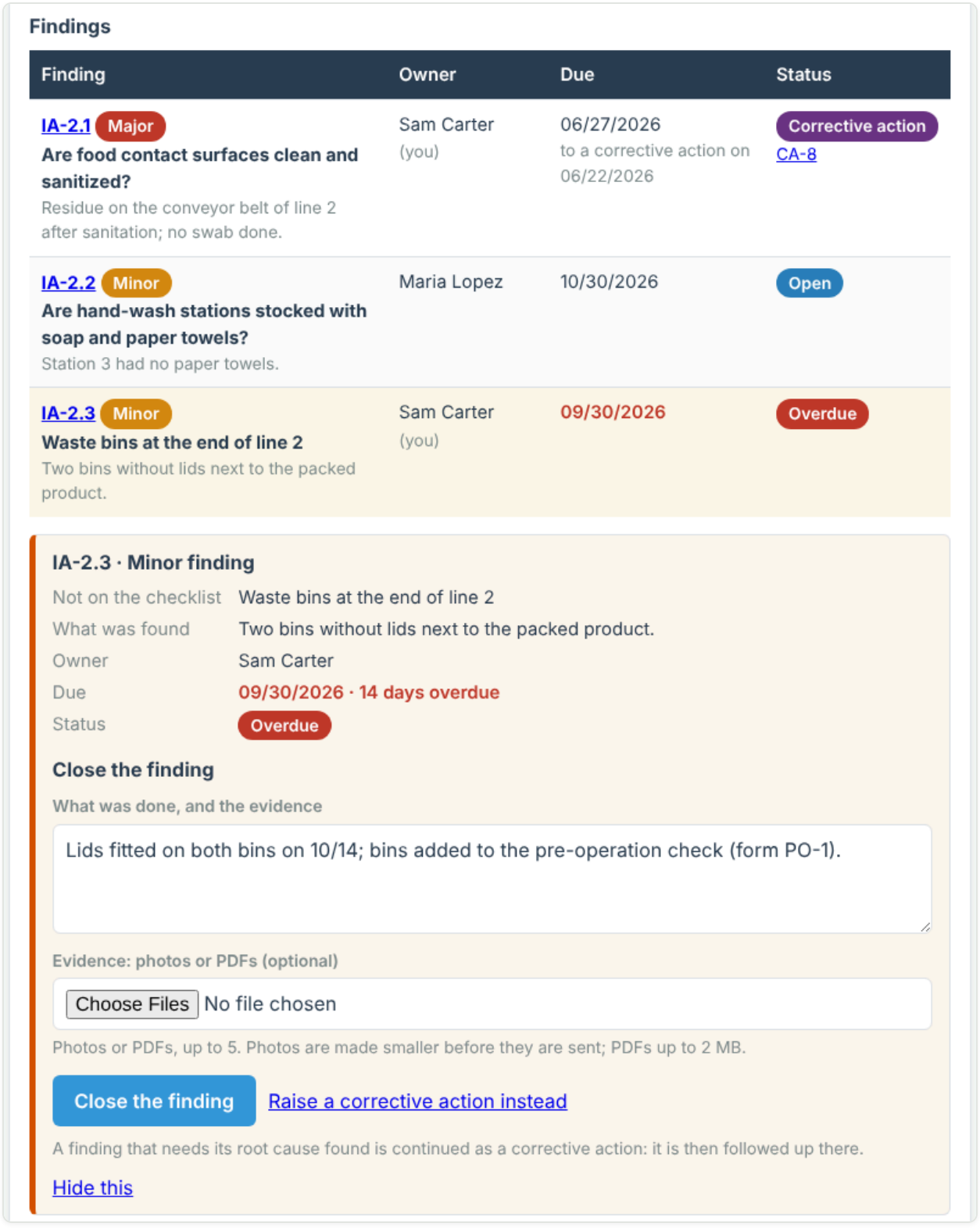
- The findings are numbered after the audit (IA-3.1, IA-3.2, ...). Their due dates start at 7 days after the audit for a major finding and 30 for a minor one (the settings).
- The owners are emailed their findings, in their language, from the site's email account.
- Once completed, the answers can't change any more. Void the audit, for Quality Control Managers, with the reason, for one started by mistake or not to be counted: it stays listed, marked Voided, and neither it nor its findings count any more.

FOLLOWING UP FINDINGS

Each finding's owner, or a Quality Control Manager, closes it once it is dealt with:

1. Open the finding: select it in the audit's Findings, or on the Findings list.

2. Under Close the finding, write What was done, and the evidence, such as the record that shows it.
3. If you want, add the evidence as photos or PDFs (up to 5).
4. Select Close the finding.

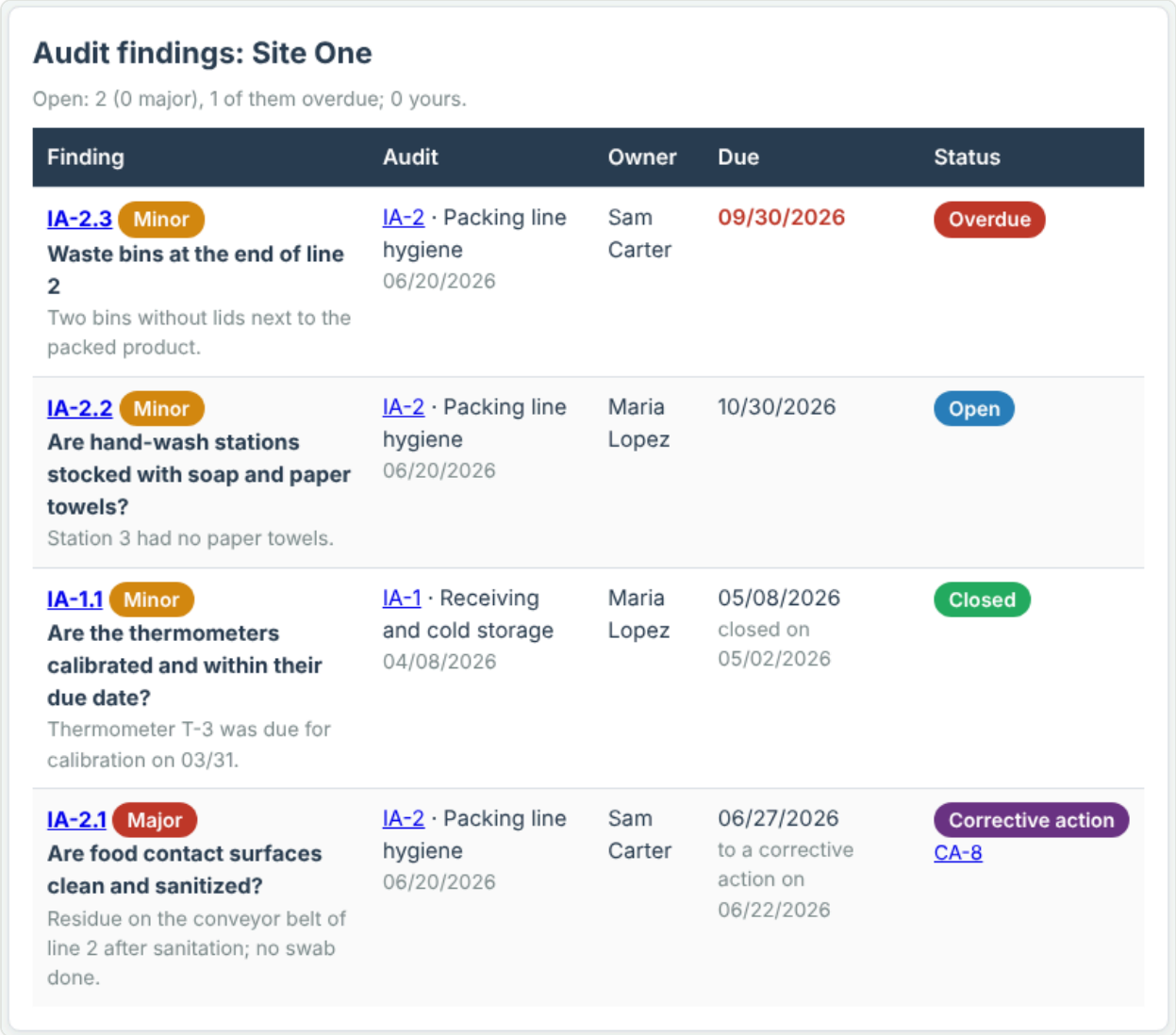


Closing a finding

- Raise a corrective action instead, for a finding whose root cause has to be found: the finding is continued as a corrective action (see 6.9) and followed up there.

- Quality Control Managers change the owner or the due date (a new owner is emailed), and reopen a closed finding with the reason when what was done wasn't enough; the evidence of the earlier close is kept apart.

Findings lists the site's findings: those open (the default), overdue, closed or continued as corrective actions, or all; tick Only mine for your own.



Audit findings: Site One

Open: 2 (0 major), 1 of them overdue; 0 yours.

Finding	Audit	Owner	Due	Status
IA-2.3 Minor **Waste bins at the end of line 2** Two bins without lids next to the packed product.	IA-2 · Packing line hygiene 06/20/2026	Sam Carter	09/30/2026	Overdue
IA-2.2 Minor **Are hand-wash stations stocked with soap and paper towels?** Station 3 had no paper towels.	IA-2 · Packing line hygiene 06/20/2026	Maria Lopez	10/30/2026	Open
IA-1.1 Minor **Are the thermometers calibrated and within their due date?** Thermometer T-3 was due for calibration on 03/31.	IA-1 · Receiving and cold storage 04/08/2026	Maria Lopez	05/08/2026 closed on 05/02/2026	Closed
IA-2.1 Major **Are food contact surfaces clean and sanitized?** Residue on the conveyor belt of line 2 after sanitation; no swab done.	IA-2 · Packing line hygiene 06/20/2026	Sam Carter	06/27/2026 to a corrective action on 06/22/2026	Corrective action CA-8

The audit findings

SETTINGS

Settings, which Quality Control Managers change: the days a major and a minor finding are due in after the audit (7 and 30 to start with; a major one can't be due later than a minor one), how many days ahead an audit is due soon (14), and

whether audits overdue and findings past their due date are reported on Trend Alerts and its daily email.

- Trend Alerts (6.13) reports audits overdue on the plan, and findings past their due date.
- The QA Dashboard (6.14) has an Internal audits tile, the Audit Pack (6.17) a section with the plan, the audits and the findings, and a management review (6.20) an Internal audits topic.

> **Note:** Give Users the Internal Audits permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections) when they audit or own findings; they see it after they next sign in. Quality Control Managers have it already; only they build checklists, start and void audits, reassign and reopen findings and change the settings. Checklists, audits and the settings each have a History.

6.30 External Audits

Management > External Audits keeps the audits of the site by outside parties: certification audits such as PrimusGFS, CanadaGAP, SQF, BRCGS, GLOBALG.A.P. or FSSC 22000, customers' audits, and others such as a health inspection. Each program keeps its certificates and when its next audit is due; each audit is recorded once it has happened, with its outcome and the score or grade on the report; and each non-conformance the auditor raised gets an owner and a due date, is answered with what was done and the evidence, and is sent to the auditor until they accept it.

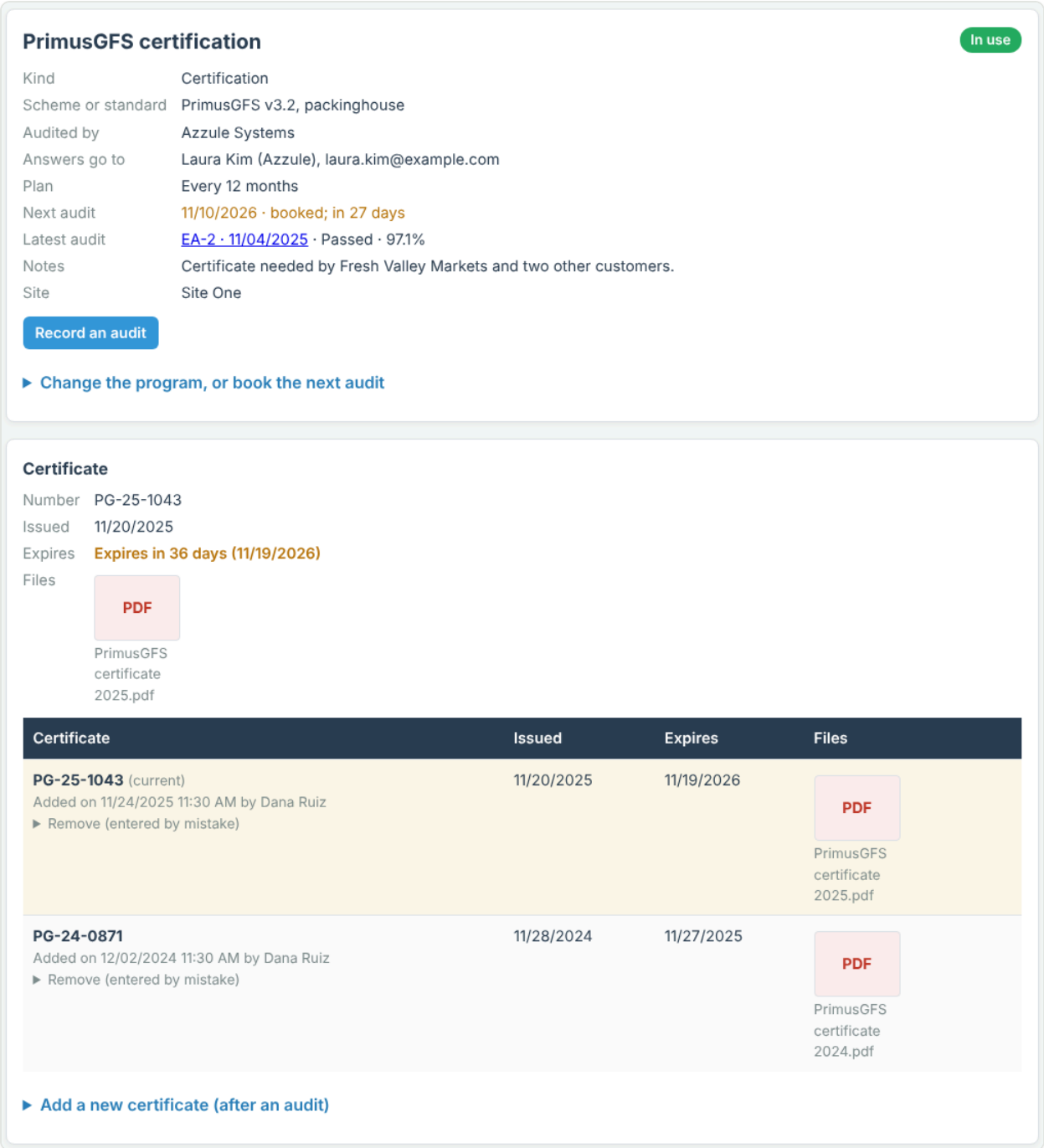
PROGRAMS AND CERTIFICATES

A program is one audit that comes back: a certification with its certification body, or a customer's audit. Quality Control Managers set them up:

1. Go to Management > External Audits and select New program.
2. Enter the Name (the usual certification programs are offered as you type: CanadaGAP first at a Canadian site, PrimusGFS first at a US one) and choose

the Kind: Certification, Customer audit, or Other (a regulator, a second party).

3. If you want, enter the Scheme or standard, who it is Audited by (the certification body, or the customer), Who to send the answers to (name, email, phone) and Notes.
4. To plan it, enter Audit every (months); once the date is set, enter Next audit booked for.
5. Select Create the program.
6. On the program’s page, under Add the certificate, enter the Certificate number, Issued on and Expires on, and add the certificate as a PDF or photo if you want. Select Add the certificate.

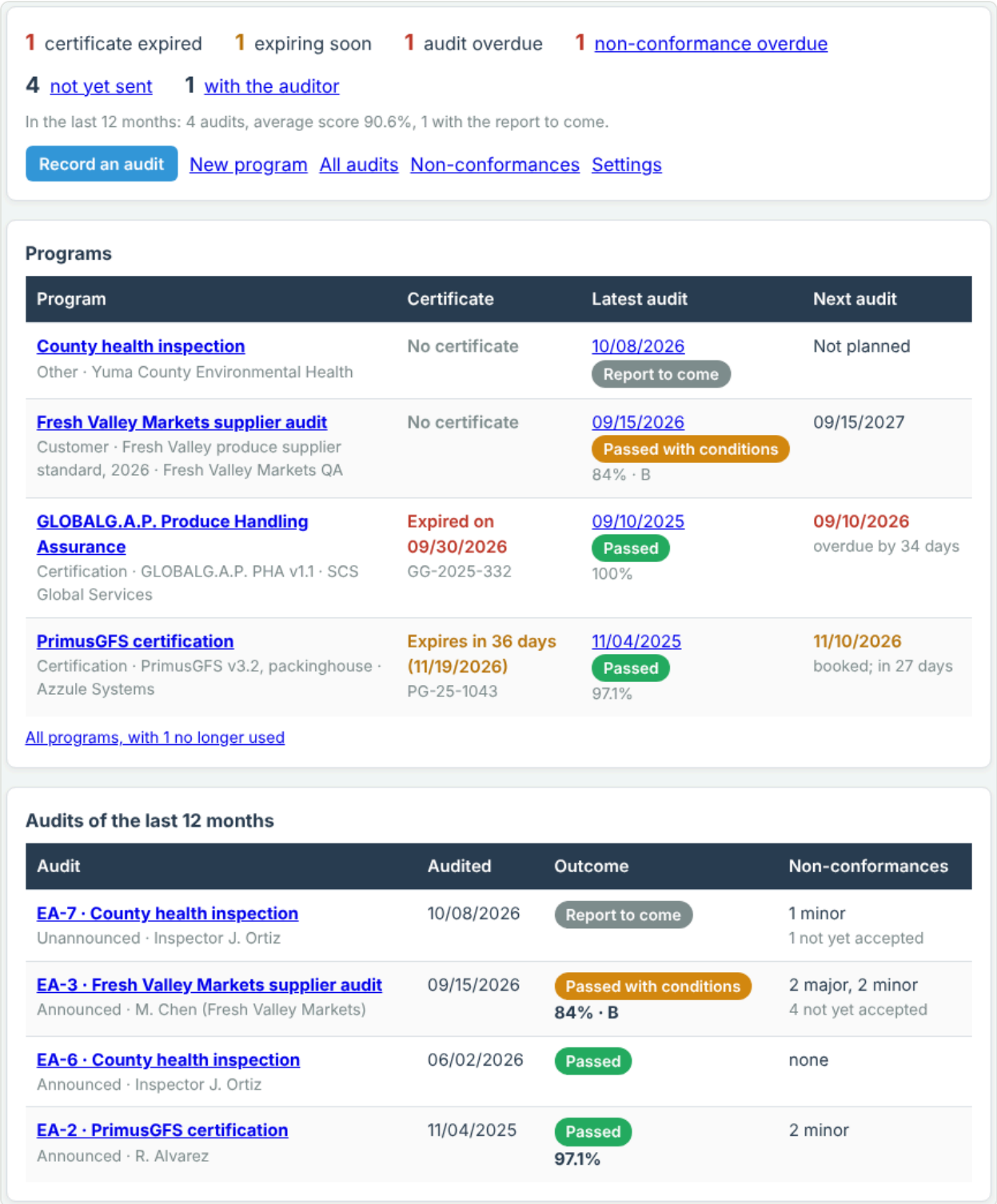


An audit program and its certificates

- The next audit is due that many months after the latest one, or on the date it is booked for. Leave Audit every empty for an audit that isn't planned, such as a health inspection.
- After each certification audit, add the new certificate under Add a new certificate (after an audit): the latest issued is the current one, and earlier ones are kept. A customer's approval letter can be kept the same way.

- Change the program, or book the next audit changes the details and the plan, books the next audit’s date, and whether the program is In use: one no longer used keeps its audits.

Management > External Audits opens on the counts (certificates expired and expiring soon, audits overdue, non-conformances overdue, not yet sent and with the auditor), then Programs: each program in use with its certificate, its latest audit with the outcome and score, and when the next audit is due, in amber when soon and in red when overdue. Below are the audits of the last 12 months with their non-conformances.



External audits: the programs and the latest audits

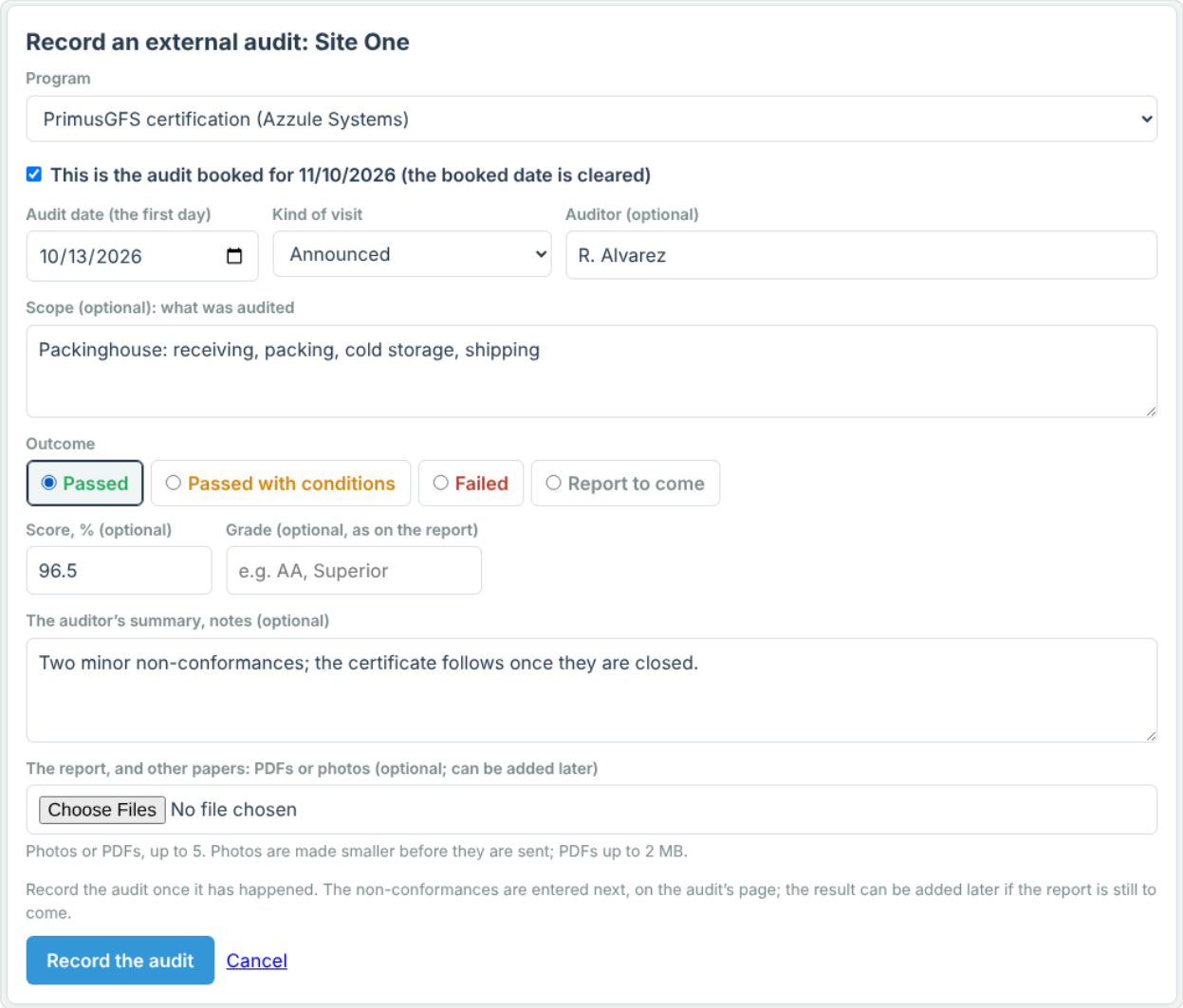
A certificate is expiring soon 60 days before it expires, and an audit is due soon 30 days before (in the settings). All audits lists every audit, by program and outcome.

Certificates also come from Buyer Compliance (see 6.64): a site's certificate from USDA Organic INTEGRITY or Azzule, added there by hand or read from the system through its API (USDA Organic INTEGRITY's; Azzule's once it is connected), goes to the site's organic or PrimusGFS certification program, or to one made for it named USDA Organic (NOP) or PrimusGFS, and Azzule's audit, with its score, is recorded as an audit of that program. Its note says where it came from. The same certificate isn't added twice. The certifications' current certificates and latest audits are the audit information Buyer Compliance gives the buyers.

RECORDING AN AUDIT

Quality Control Managers record each audit once it has happened:

1. Select Record an audit, on the list or on the program's page.
2. Choose the Program. When it has an audit booked, This is the audit booked for is ticked if the audit date is within 60 days of it: leave it ticked for the audit that was booked, and the booked date is cleared.
3. Enter the Audit date (the first day, today or earlier), choose the Kind of visit (Announced, Unannounced, Follow-up (re-audit) or Remote) and, if you want, enter the Auditor and the Scope: what was audited.
4. Choose the Outcome: Passed, Passed with conditions, Failed, or Report to come when the result isn't known yet.
5. If you want, enter the Score, % and the Grade as on the report, the auditor's summary, and add the report and other papers as PDFs or photos (up to 5).
6. Select Record the audit.



Recording an external audit

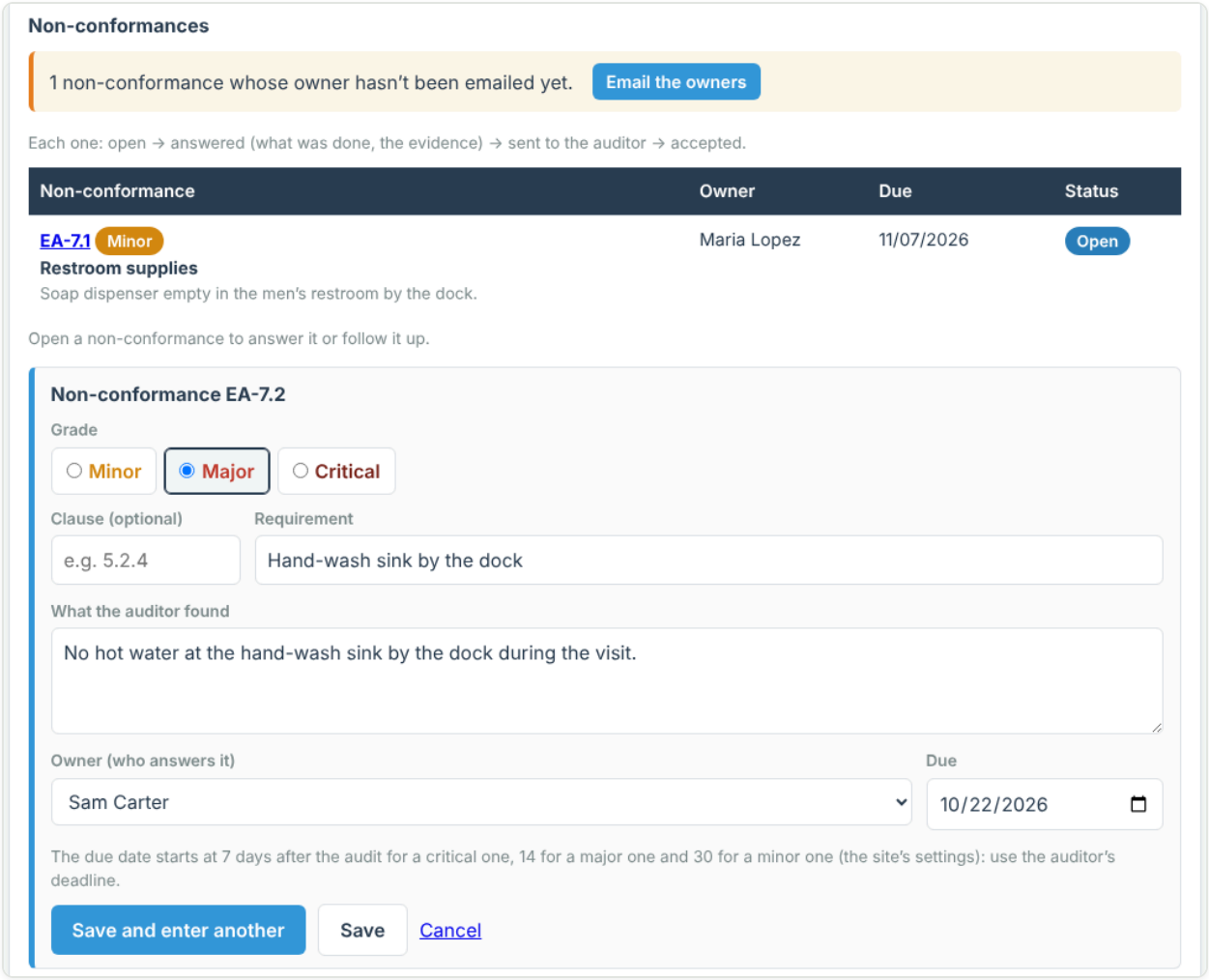
- The audits are numbered EA-1, EA-2, … Change the audit, or add its result changes the details, and adds the outcome, score and grade once a report to come arrives. Add the report, or other papers adds files later.
- Void the audit (recorded by mistake), for Quality Control Managers, with the reason: the audit stays listed, marked Voided, and neither it nor its non-conformances count any more for the plan or the reports.

NON-CONFORMANCES

Next, a Quality Control Manager enters the audit's non-conformances, as the report gives them:

1. On the audit's page, select Enter a non-conformance.

2. Choose the Grade: Minor, Major or Critical.
3. Enter the Clause if you want, the Requirement it is about, and What the auditor found.
4. Choose the Owner (who answers it), and check the Due date: use the auditor's deadline.
5. Select Save and enter another for the next one, or Save.
6. When they are all in, select Email the owners.

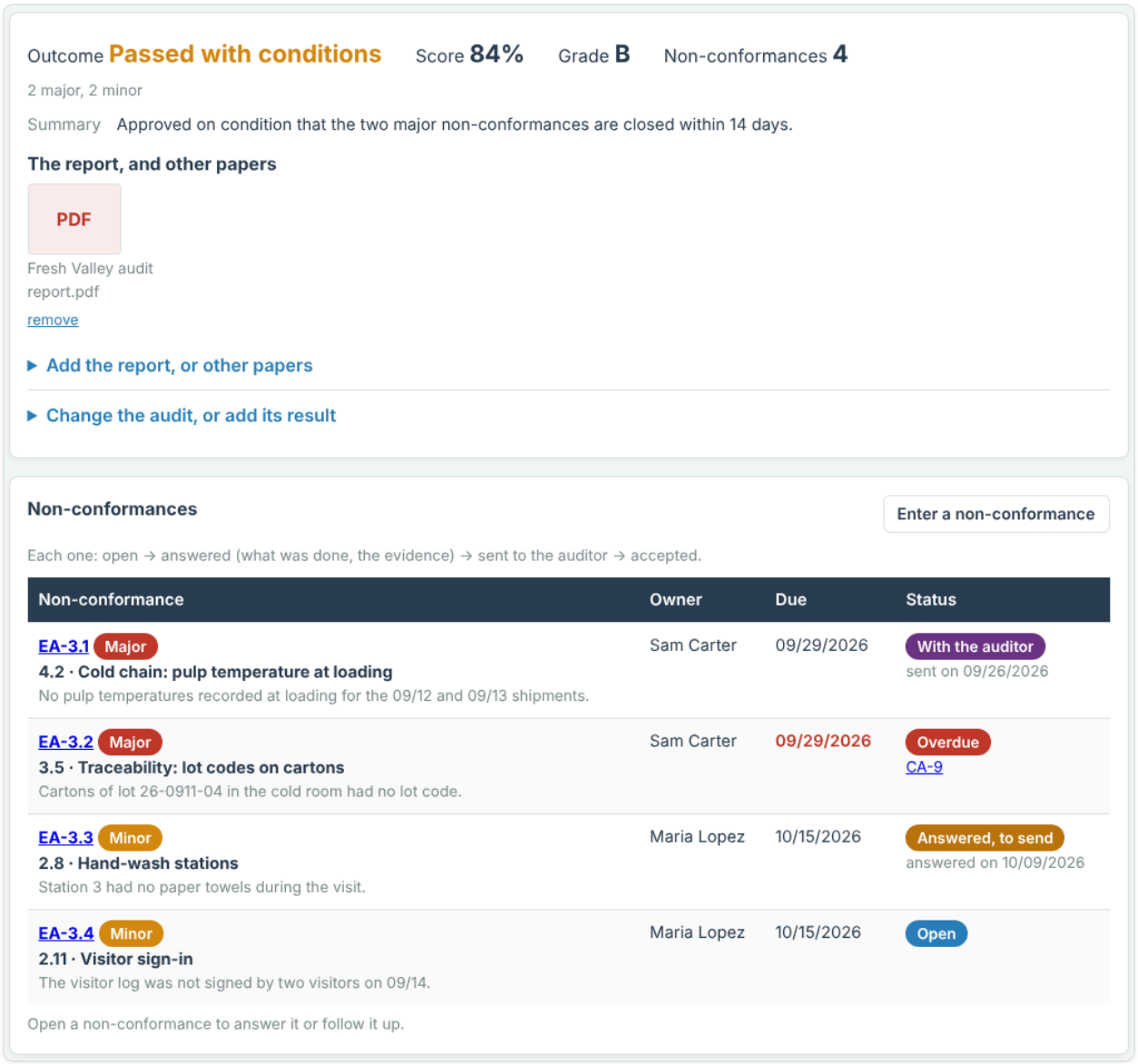


Entering a non-conformance

- The non-conformances are numbered after the audit (EA-7.1, EA-7.2, ...). The due date starts at 7 days after the audit for a critical one, 14 for a major one and 30 for a minor one (the settings), and follows the grade you choose until you change it.

- Email the owners sends each owner the non-conformances they answer, in their language, from the site's email account. The owners are the site's Quality Control Managers and its Users with the External Audits permission.
- Until it is sent to the auditor, Quality Control Managers can change what a non-conformance says, change its owner or due date (a new owner is emailed), or remove it, with the reason, when it was entered by mistake.

The audit's page shows the result, the report and the non-conformances, each with its owner, due date and where it stands: open, answered (to send), with the auditor, accepted, or overdue when it is open or answered past its due date.

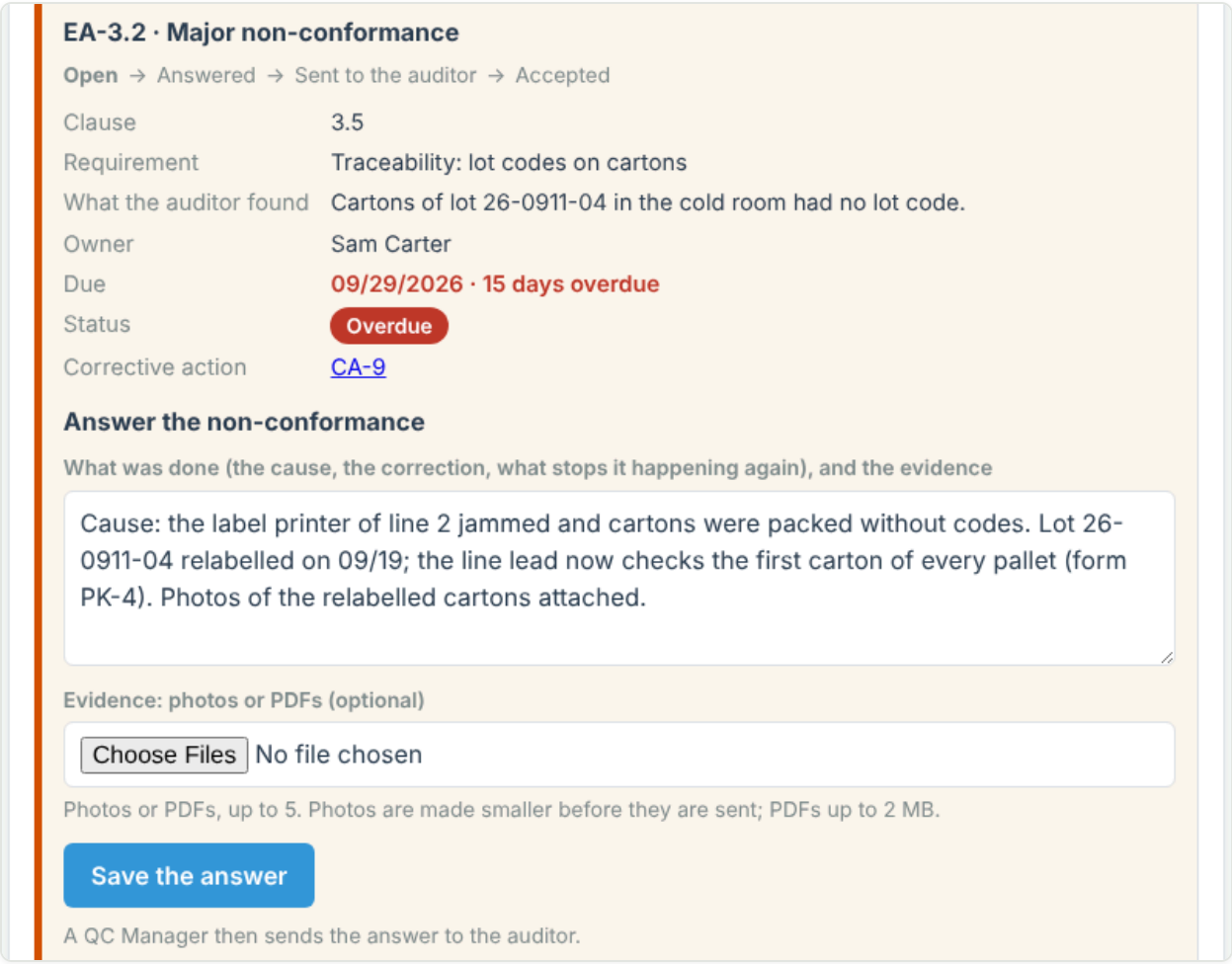


An audit's result and non-conformances

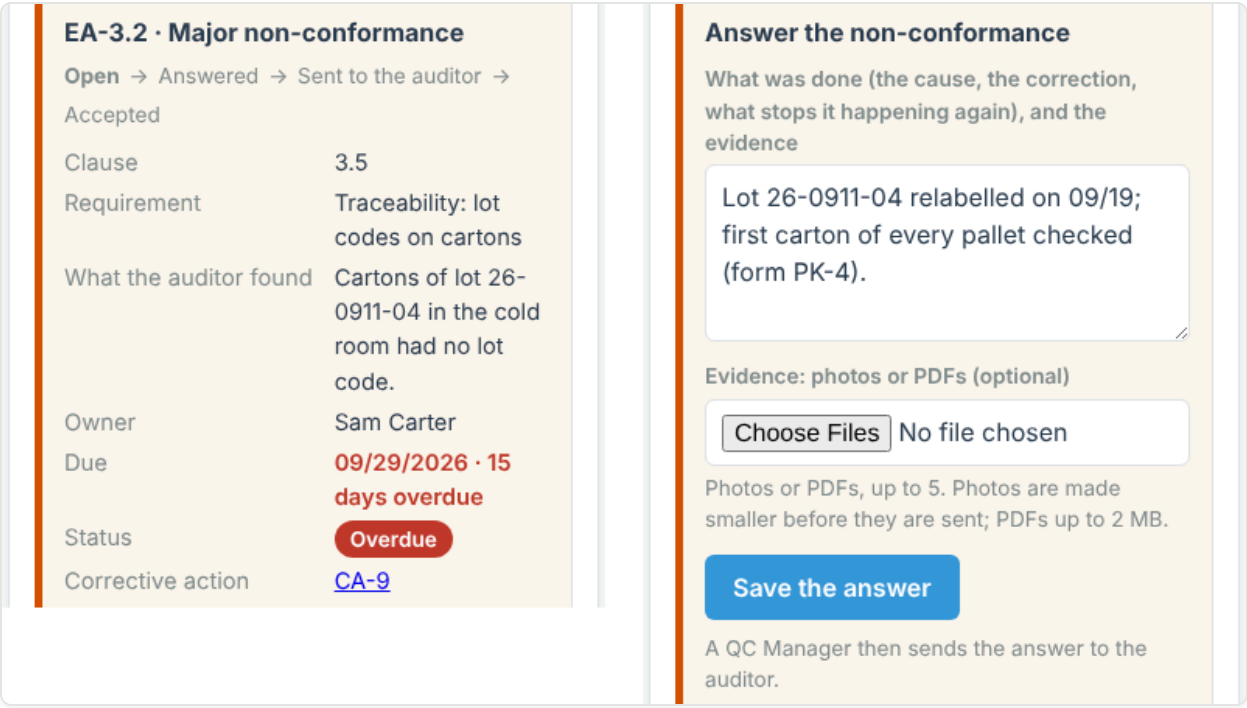
ANSWERING A NON-CONFORMANCE

Each non-conformance's owner, or a Quality Control Manager, answers it, on a computer or a phone:

1. Open the non-conformance: select it on the audit's page, or on the Non-conformances list.
2. Under Answer the non-conformance, write What was done: the cause, the correction, what stops it happening again, and the evidence.
3. If you want, add the evidence as photos or PDFs (up to 5).
4. Select Save the answer.



Answering a non-conformance



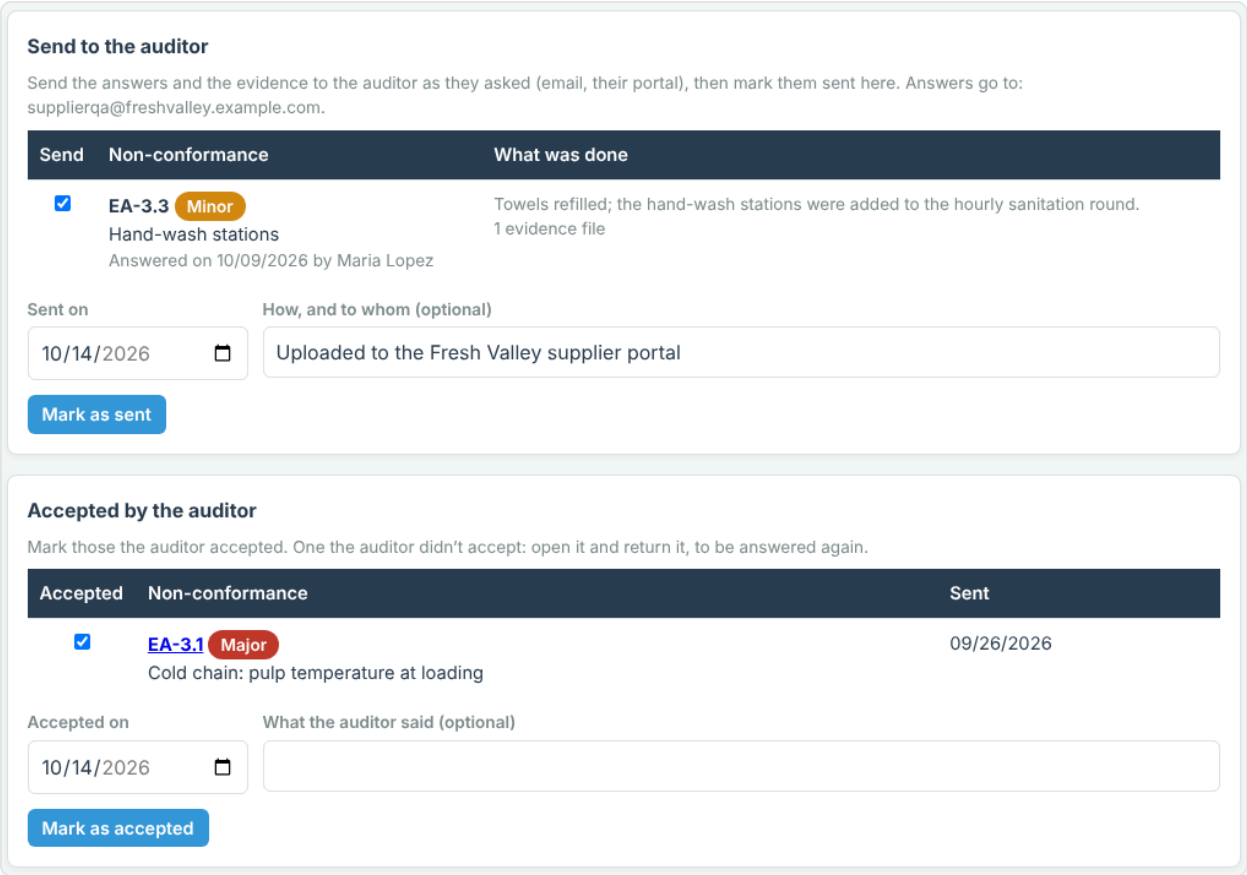
A non-conformance on a phone

- Raise a corrective action for its root cause, for a non-conformance whose cause has to be found and fixed for good: a corrective action is raised from it (see 6.9) and linked to it. The non-conformance is still answered and sent to the auditor.
- A Quality Control Manager can return an answer that isn't enough to its owner, with what it is missing, before it is sent.

SENDING TO THE AUDITOR

Quality Control Managers send the answers and the evidence to the auditor as they asked (by email, or on their portal), then mark them on the audit's page:

1. Under Send to the auditor, tick the answers sent, enter the Sent on date and, if you want, How, and to whom. Select Mark as sent.
2. When the auditor accepts them, under Accepted by the auditor, tick those accepted, enter the Accepted on date and, if you want, What the auditor said. Select Mark as accepted.



Sending answers to the auditor, and marking them accepted

When the auditor doesn't accept an answer, open the non-conformance and select The auditor didn't accept it: return it to be answered again. Write what the auditor said is missing and select Return it: it is open again, its owner is emailed, and the evidence sent before is kept apart. Change the due date if the auditor gave more time.

Non-conformances lists the site's non-conformances: those not yet sent to the auditor (the default), not answered yet, overdue, answered and to send, with the auditor, accepted, or all; tick Only mine for those you answer.

External audit non-conformances: Site One

Not yet sent: 4 (0 critical, 1 major), 1 of them overdue, 1 answered; 1 with the auditor; 0 yours to answer.

Non-conformance	Audit	Owner	Due	Status
EA-3.2 Major **3.5 · Traceability: lot codes on cartons** Cartons of lot 26-0911-04 in the cold room had no lot code.	EA-3 · Fresh Valley Markets supplier audit 09/15/2026	Sam Carter	09/29/2026	Overdue CA-9
EA-3.4 Minor **2.11 · Visitor sign-in** The visitor log was not signed by two visitors on 09/14.	EA-3 · Fresh Valley Markets supplier audit 09/15/2026	Maria Lopez	10/15/2026	Open
EA-7.1 Minor **Restroom supplies** Soap dispenser empty in the men's restroom by the dock.	EA-7 · County health inspection 10/08/2026	Maria Lopez	11/07/2026	Open
EA-3.3 Minor **2.8 · Hand-wash stations** Station 3 had no paper towels during the visit.	EA-3 · Fresh Valley Markets supplier audit 09/15/2026	Maria Lopez	10/15/2026	Answered, to send answered on 10/09/2026
EA-3.1 Major **4.2 · Cold chain: pulp temperature at loading** No pulp temperatures recorded at loading for the 09/12 and 09/13 shipments.	EA-3 · Fresh Valley Markets supplier audit 09/15/2026	Sam Carter	09/29/2026	With the auditor sent on 09/26/2026
EA-2.1 Minor **5.10.4 · Glass and brittle plastic register** Two light covers in cold room 3 not on the register.	EA-2 · PrimusGFS certification 11/04/2025	Sam Carter	12/04/2025	Accepted accepted on 11/25/2025
EA-2.2 Minor **5.17.2 · Thermometer calibration records** Probe P-4 calibration record for September missing.	EA-2 · PrimusGFS certification 11/04/2025	Maria Lopez	12/04/2025	Accepted accepted on 11/25/2025

The non-conformances of the site

SETTINGS

Settings, which Quality Control Managers change: the days a critical, a major and a minor non-conformance are due in after the audit (7, 14 and 30 to start with; a more serious one should be due no later than a less serious one), how many days ahead an audit is due soon (30) and a certificate is expiring soon (60), and whether certificates expiring, audits overdue and non-conformances past their due date are reported on Trend Alerts and its daily email.

- Trend Alerts (6.13) reports certificates expired or expiring, audits overdue, and non-conformances past their due date.
- The QA Dashboard (6.14) has an External audits tile, the Audit Pack (6.17) a section with the programs, the audits and the non-conformances, and a management review (6.20) an External audits and certifications topic.

> **Note:** Give Users the External Audits permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections) when they answer non-conformances or follow the audits; they see it after they next sign in. Quality Control Managers have it already; only they set up programs and certificates, record, change and void audits, enter, change and remove non-conformances, email the owners, mark answers sent, accepted or returned, and change the settings. Programs, audits, non-conformances and the settings each have a History.

6.31 Change Control

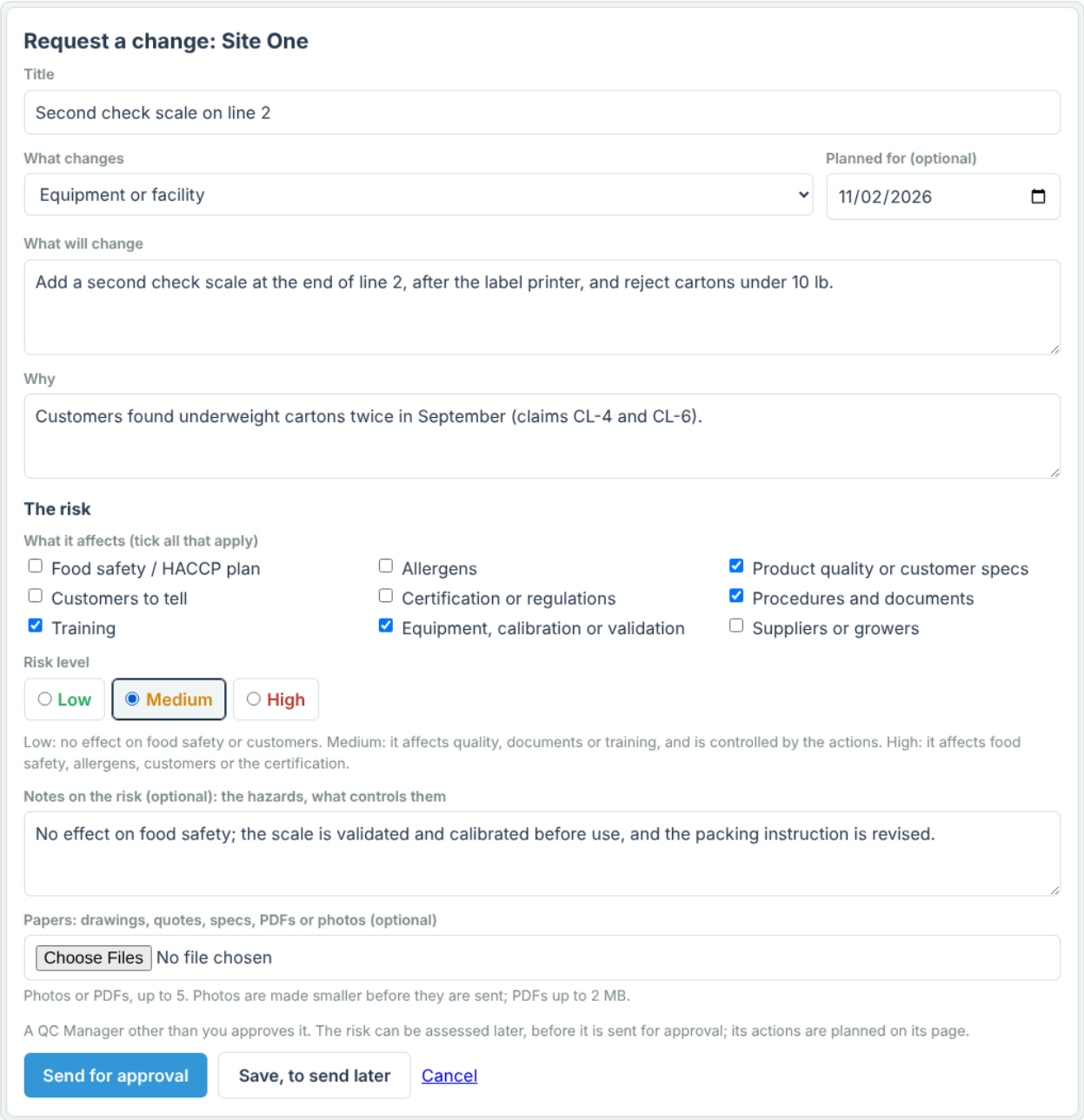
Problems > Change Control keeps the changes to the site's processes, products, equipment, suppliers, procedures and people that could affect food safety or quality, such as a new packaging supplier, a new machine on a line or a new cleaning time. Each change is requested with what will change and why; its risk is assessed; a Quality Control Manager other than the person who asked approves it; the work to carry it out is split into actions, each with an owner and a due date; and once it is in effect, it is checked later that it worked.

A change goes through these stages: Requested → Approved → Actions done → In effect → Checked. A change can also be sent back for more information, rejected, or withdrawn.

REQUESTING A CHANGE

Anyone with the Change Control permission can request a change:

1. Go to Problems > Change Control and select Request a change.
2. Enter a Title, choose What changes (a process or method; a product, recipe or packaging; equipment or a facility; a supplier, grower or material; a procedure or document; people or the organization; or other) and, if you know it, when it is Planned for.
3. Write What will change, and Why.
4. Under The risk, tick What it affects, choose the Risk level (Low, Medium or High) and, if you want, write Notes on the risk: the hazards, and what controls them.
5. If you want, add Papers: drawings, quotes, specs, as PDFs or photos (up to 5).
6. Select Send for approval, or Save, to send later.



Requesting a change

- The risk level: Low when it has no effect on food safety or customers; Medium when it affects quality, documents or training, and the actions control it; High when it affects food safety, allergens, customers or the certification.
- A change can’t be sent for approval until its risk is assessed. Until it is approved, the requester or a Quality Control Manager can open it and select Change the request, or assess the risk, add papers, or send it with Send for approval.
- The changes are numbered CH-1, CH-2, ...

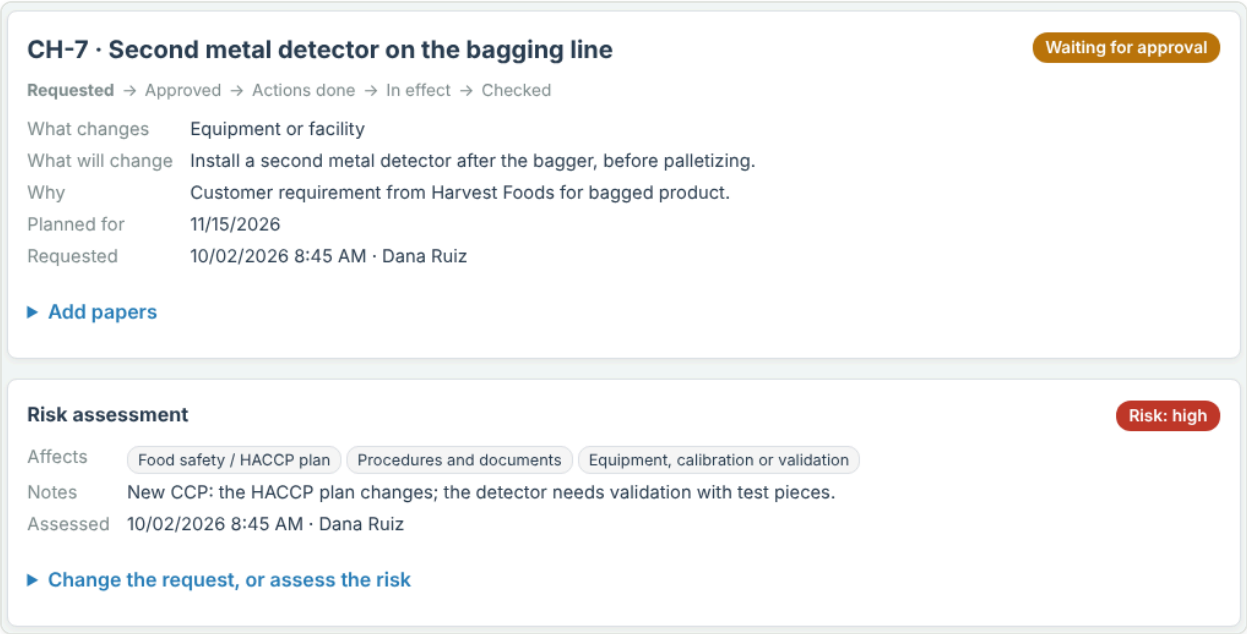
Problems > Change Control opens on the counts (waiting for approval, in progress, actions overdue, to check, and the actions that are yours), then the site’s changes: waiting for approval, in progress, in effect and to check, requested and not yet sent, and those closed, rejected or withdrawn in the last 12 months. Each shows what changes and who asked, the risk and what it affects, how many of its actions are done, and where it stands, in red when it waits too long or its check is overdue. All changes lists them all, by where they stand and what changes.



Change control: the changes of a site

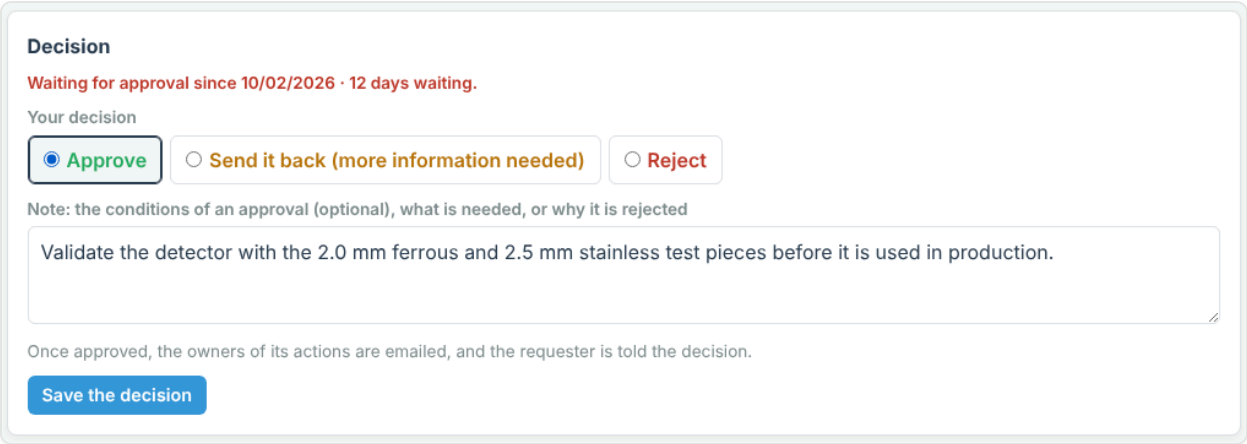
APPROVING A CHANGE

Sending a change for approval emails the site's Quality Control Managers, in their language, from the site's email account; the one who asked is left out. One of them decides:



A change waiting for approval, and its risk

1. Open the change: from the email, or under Waiting for approval.
2. Read what will change and why, the risk and the papers.
3. Under Decision, choose Your decision: Approve, Send it back (more information needed), or Reject.
4. Write the Note: the conditions of an approval (optional), what is needed, or why it is rejected.
5. Select Save the decision.



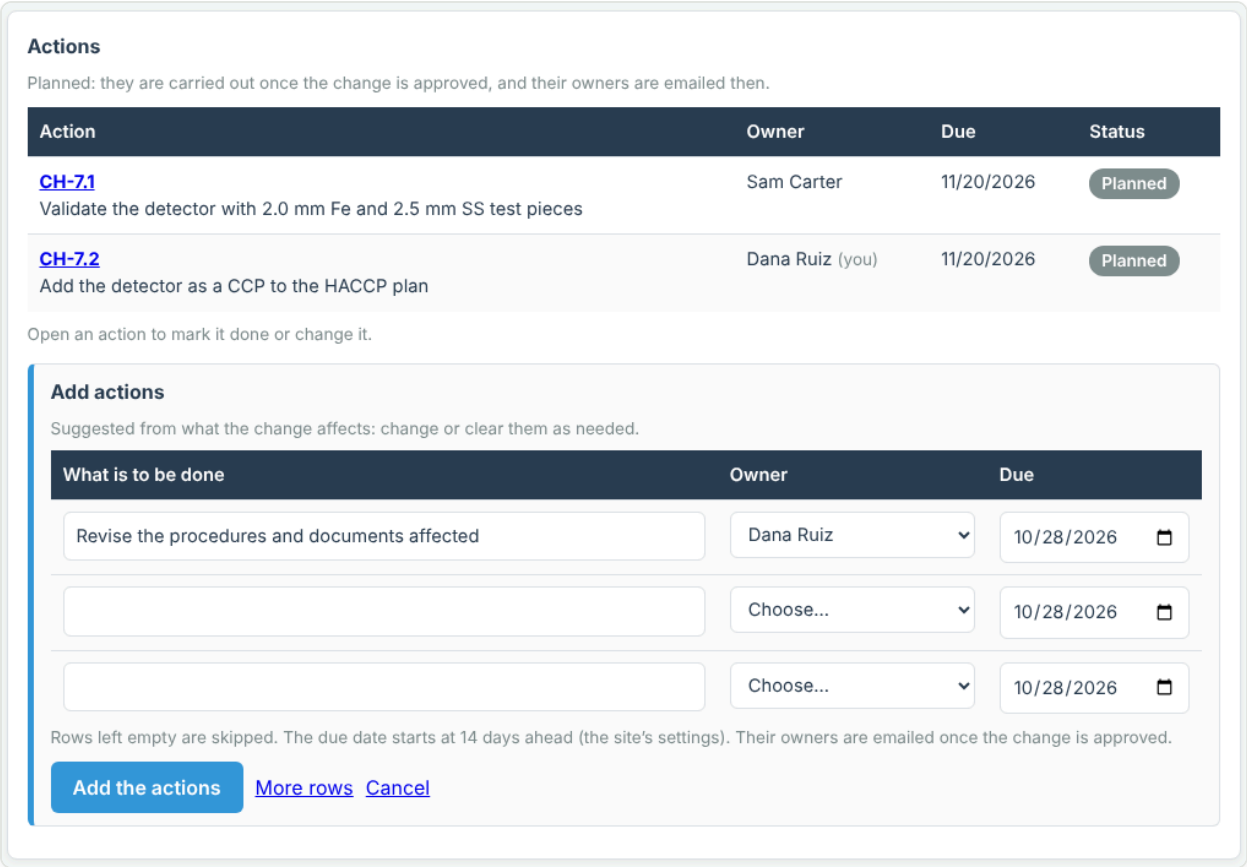
Deciding on a change

- Approved: the requester is emailed the decision, and the owners of its actions are emailed their actions. The actions can now be carried out.
- Sent back: the requester is emailed what is needed, changes the request and sends it again.
- Rejected: the requester is emailed why. The change stays listed, marked Rejected.
- A Quality Control Manager can't decide on a change they asked for, unless the site has no other active Quality Control Manager; the history then says so.

ACTIONS

The work to carry out a change is split into actions, such as revising a procedure, training the staff, validating a machine or telling a customer, each with an owner and a due date. The requester or a Quality Control Manager can plan them before the change is approved; once it is approved, Quality Control Managers add and change them.

1. On the change's page, select Add actions.
2. Rows are suggested for what the change affects that no action covers yet: change their text, or clear the ones not needed. Select More rows for more.
3. For each action, write What is to be done, choose the Owner, and check the Due date.
4. Select Add the actions.



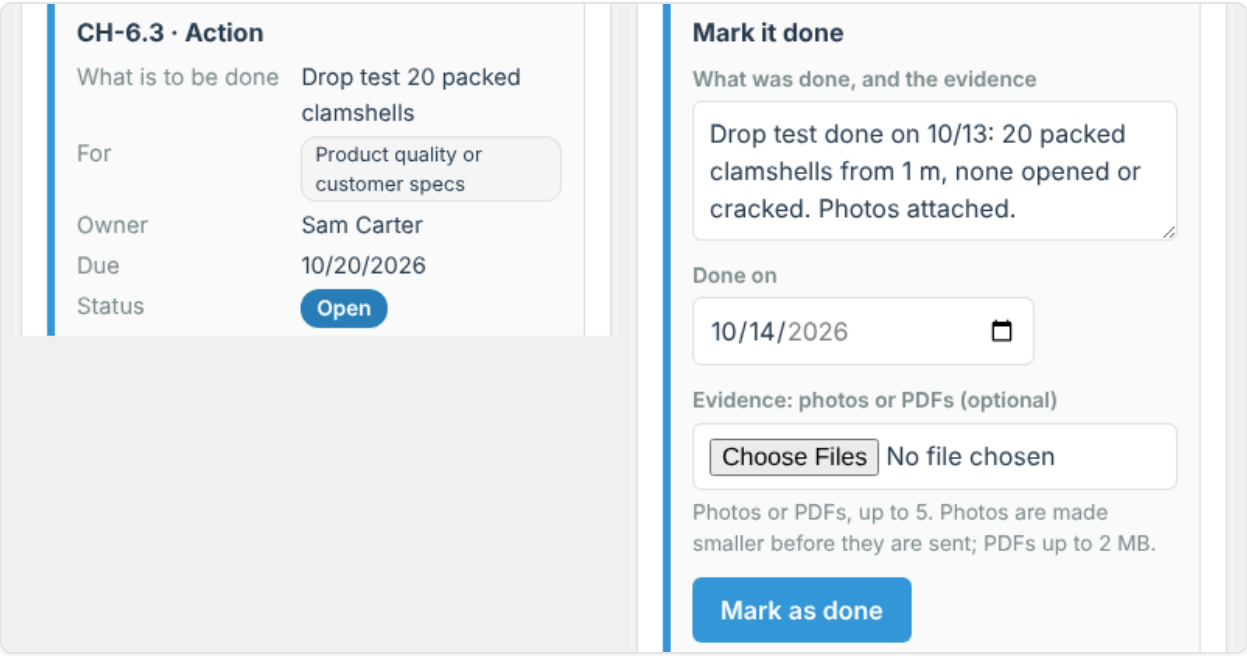
The actions of a change, and adding more

- The actions are numbered after the change (CH-6.1, CH-6.2, ...). The due date starts at 14 days ahead (in the settings). The owners are the site's Quality Control Managers and its Users with the Change Control permission.
- The owners are emailed their actions, in their language, when the change is approved, or when an action is added or given to them after that.
- An action is overdue when it isn't done by its due date while the change is being carried out.
- When an owner couldn't be emailed (for example, the site's email account isn't set up), the change's Actions say so, and a Quality Control Manager can select Email them now.

The owner of an action, or a Quality Control Manager, marks it done, on a computer or a phone:

1. Open the action: select it in the change's Actions, or on the Actions list.

2. Under Mark it done, write What was done, and the evidence, and check the Done on date.
3. If you want, add the evidence as photos or PDFs (up to 5).
4. Select Mark as done.



Marking an action done on a phone

- Quality Control Managers can Change the action, its owner or due date (a new owner is emailed), Remove it (no longer needed) with the reason, or Reopen it (what was done isn't enough) with what is still to be done and a new due date: its owner is emailed, and what was done before stays in the history.
- Actions lists the site's actions: Open (approved changes), Overdue, Planned (changes not yet approved), Done, or All; tick Only mine for your own.

Change actions: Site One

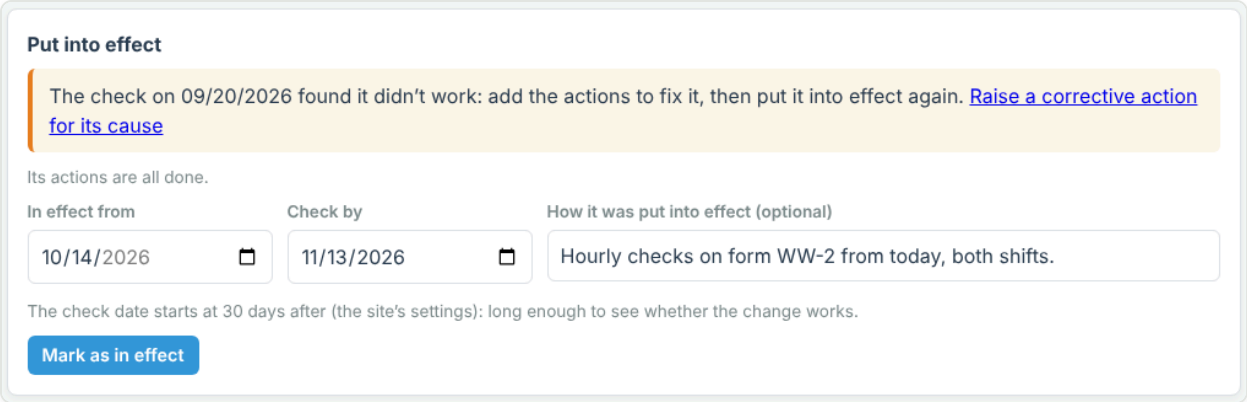
Open: 2, 1 of them overdue; 1 yours.

Action	Change	Owner	Due	Status
CH-6.2 Tell Fresh Valley Markets and get their approval	CH-6 · New clamshell supplier for berries	Dana Ruiz (you)	10/09/2026	Overdue
CH-6.3 Drop test 20 packed clamshells	CH-6 · New clamshell supplier for berries	Sam Carter	10/20/2026	Open
CH-7.1 Validate the detector with 2.0 mm Fe and 2.5 mm SS test pieces	CH-7 · Second metal detector on the bagging line	Sam Carter	11/20/2026	Planned
CH-7.2 Add the detector as a CCP to the HACCP plan	CH-7 · Second metal detector on the bagging line	Dana Ruiz (you)	11/20/2026	Planned
CH-1.1 Validate 80 ppm against the swab limits on line 1 (trial week) Trial week: all 15 swabs under the limit at 80 ppm.	CH-1 · Switch line 1 sanitizer to peracetic acid	Sam Carter	08/05/2026	Done done on 08/05/2026
CH-1.4 Calibrate the foamer dosing pump for 80 ppm Pump calibrated to 80 ppm (3 readings within 75-85 ppm).	CH-1 · Switch line 1 sanitizer to peracetic acid	Sam Carter	08/05/2026	Done done on 08/03/2026
CH-1.2 Revise SSOP-4 (line 1 sanitation) for the new product SSOP-4 version 5 issued.	CH-1 · Switch line 1 sanitizer to peracetic acid	Dana Ruiz (you)	08/07/2026	Done done on 08/06/2026
CH-1.3 Train the sanitation crew, with PPE Crew of 6 trained on 08/07 (sign-in sheet in the training file).	CH-1 · Switch line 1 sanitizer to peracetic acid	Sam Carter	08/07/2026	Done done on 08/07/2026
CH-3.1 Revise form WW-1 for hourly checks Form WW-1 version 3 issued.	CH-3 · Hourly wash-water chlorine checks	Dana Ruiz (you)	08/19/2026	Done done on 08/18/2026
CH-3.2 Brief the wash-line operators Day and night operators briefed.	CH-3 · Hourly wash-water chlorine checks	Sam Carter	08/19/2026	Done done on 08/19/2026
CH-5.1 Update the line 2 packing instruction Packing instruction PI-2 updated.	CH-5 · Move the line 2 label printer	Sam Carter	09/20/2026	Done done on 09/19/2026
CH-5.2 Show the line 2 packers the new printer place Shown to both shifts.	CH-5 · Move the line 2 label printer	Sam Carter	09/20/2026	Done done on 09/20/2026
CH-6.1 Get the clamshell spec and food-contact letter from PackRight Spec and food-contact letter received and filed.	CH-6 · New clamshell supplier for berries	Maria Lopez	10/02/2026	Done done on 10/01/2026
CH-3.3 Add the hourly check to the night shift handover sheet Night crew trained on the hourly checks.	CH-3 · Hourly wash-water chlorine checks	Sam Carter	10/21/2026	Done done on 10/13/2026

The actions of the site's changes

PUTTING A CHANGE INTO EFFECT

Once all its actions are done, a Quality Control Manager puts the change into effect: under Put into effect, enter the day it took effect (In effect from, from the approval to today), when it is to be checked (Check by, 30 days later to start with, in the settings), and if you want, How it was put into effect. Select Mark as in effect.

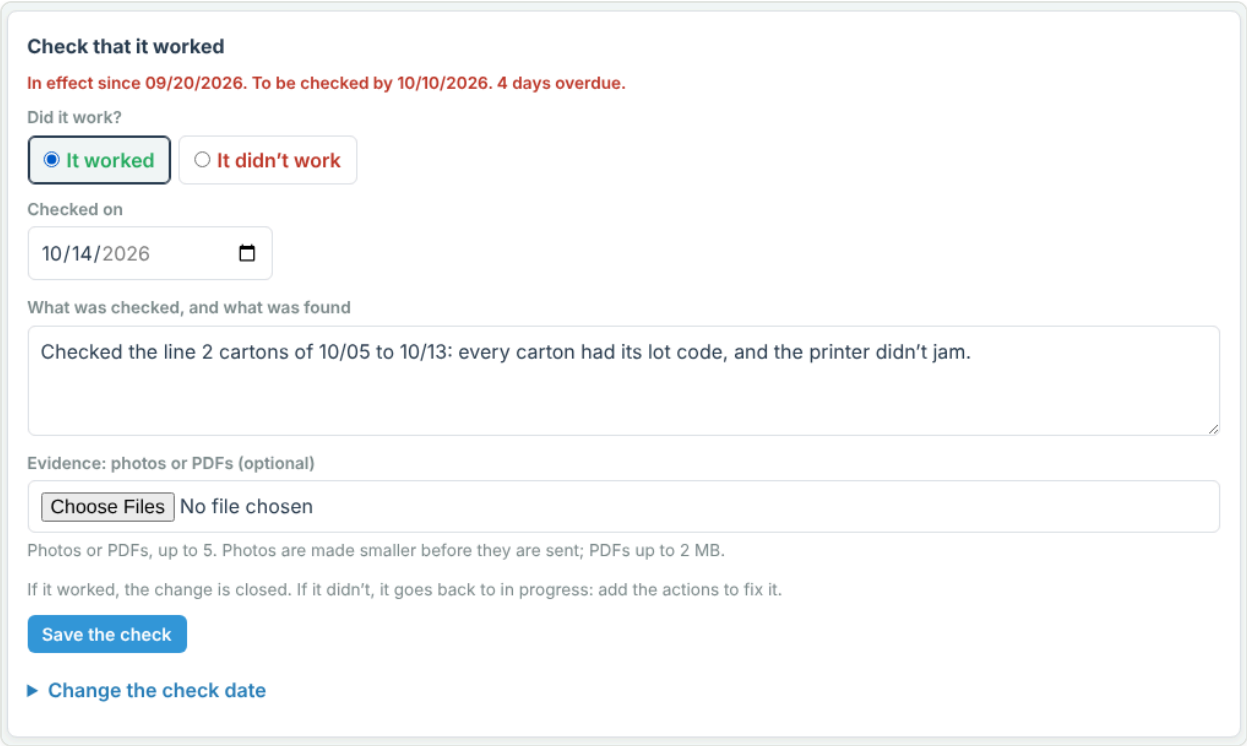


Putting a change into effect

CHECKING A CHANGE

By its check date, a Quality Control Manager checks that the change worked: that it did what it was meant to, with no new problems.

1. Open the change: under In effect, to check.
2. Under Check that it worked, choose It worked or It didn't work, and check the Checked on date.
3. Write What was checked, and what was found.
4. If you want, add the evidence as photos or PDFs (up to 5).
5. Select Save the check.



Checking that a change worked

- It worked: the change is closed.
- It didn't work: the change is in progress again. Add the actions that fix it (at least one is needed before it goes back into effect, on or after the day of that check); once they are done, put it into effect again and check it again. The requester or a Quality Control Manager can also select Raise a corrective action for its cause: a corrective action is raised from it (see 6.9) and linked to it. A change has one corrective action: if a later check finds it still doesn't work, that one follows it up.
- Change the check date moves the date it is to be checked by. A change not checked by its date is overdue.

Withdraw the change (it isn't going ahead), with the reason, takes back a change that won't be made: the requester can withdraw it until it is approved, and a Quality Control Manager until it is put into effect. It stays listed, marked Withdrawn, with its actions.

SETTINGS

Settings, which Quality Control Managers change: when a change waiting for a decision is reported (after 7 days to start with), when a new action is due (14 days ahead) and when a change is to be checked after it takes effect (30 days), and whether changes waiting too long, actions overdue and checks overdue are reported on Trend Alerts and its daily email.

- Trend Alerts (6.13) reports changes waiting for a decision too long, change actions overdue, and changes not checked by their date.
- The QA Dashboard (6.14) has a Change control tile, the Audit Pack (6.17) a section with the changes and their actions, and a management review (6.20) the change control figures under Changes affecting quality.

> **Note:** Give Users the Change Control permission on gear > Users > Add / Change User Permissions (it is listed with Edit Quality Inspections) when they request changes or carry out their actions; they see it after they next sign in. Quality Control Managers have it already; only they decide on changes, add, change, remove and reopen the actions of an approved change, put changes into effect, check them, and change the settings. Changes and the settings each have a History.

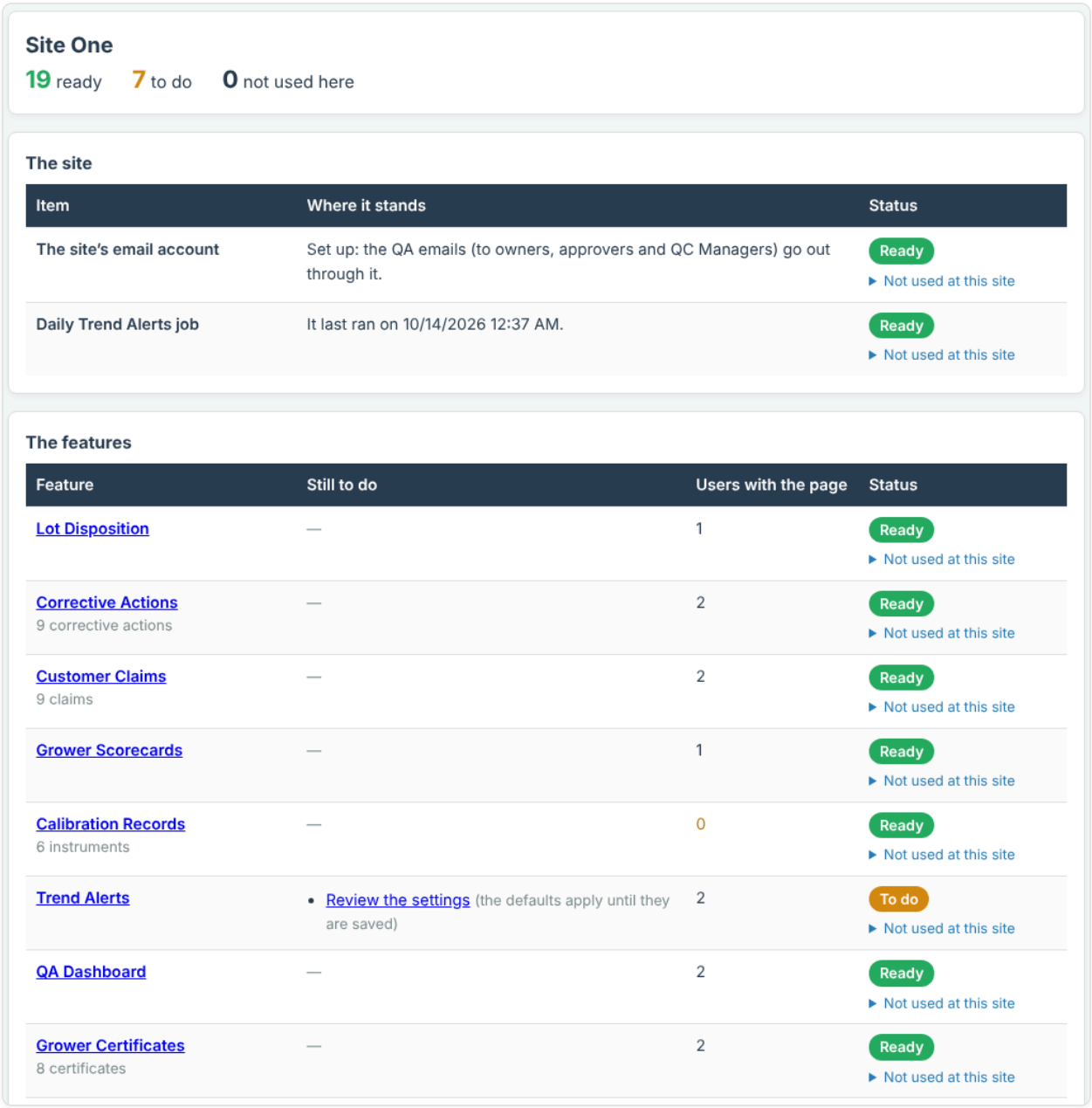
6.32 QA Setup

Overview > QA Setup shows, site by site, what is still to set up for the quality assurance features of this chapter: the site's email account, the daily Trend Alerts job, and for each feature its settings, the records it needs, and which Users have its page. Quality Control Managers see their sites; administrators see every site. Users don't have it.

READING THE CHECKLIST

1. Go to Overview > QA Setup.
2. With more than one site, choose the Site and select Apply Filter.

3. Read the counts at the top (ready, to do, and not used here), then the items below. Each item is Ready, To do, Not used here, or Not installed.



Site One

19 ready 7 to do 0 not used here

The site

Item	Where it stands	Status
The site's email account	Set up: the QA emails (to owners, approvers and QC Managers) go out through it.	Ready ▸ Not used at this site
Daily Trend Alerts job	It last ran on 10/14/2026 12:37 AM.	Ready ▸ Not used at this site

The features

Feature	Still to do	Users with the page	Status
Lot Disposition	—	1	Ready ▸ Not used at this site
Corrective Actions 9 corrective actions	—	2	Ready ▸ Not used at this site
Customer Claims 9 claims	—	2	Ready ▸ Not used at this site
Grower Scorecards	—	1	Ready ▸ Not used at this site
Calibration Records 6 instruments	—	0	Ready ▸ Not used at this site
Trend Alerts	• Review the settings (the defaults apply until they are saved)	2	To do ▸ Not used at this site
QA Dashboard	—	2	Ready ▸ Not used at this site
Grower Certificates 8 certificates	—	2	Ready ▸ Not used at this site

QA Setup: what is ready and what is still to do at a site

- Country: United States or Canada. It sets the rules and defaults that differ between the two countries (the net weight tolerances, the regulator a recall is reported to, a mock recall at least every 12 months in Canada, the usual lists offered, and °F or °C to start with); everything else is the same in both. Until it is set here, it comes from the site's address on Add / Change Sites (see 3.2): its Country when it says Canada or the United States (when it names another

country, such as México, the site keeps the US rules until a country is set here), or else its state or province (a Canadian province or territory, by its code or name, makes the site Canadian; anything else, American). The line says where it comes from. Quality Control Managers of the site and administrators change it: choose the country and select Save. The change is in the History; a copy from another site doesn't bring it. A site without a time zone on Add / Change Sites has a Time zone item To do: its days are counted in America/Phoenix until the zone is set there.

- The site's email account: the quality assurance emails (to owners, approvers and Quality Control Managers) are sent through it. It is To do until it is set up on Verify / Modify Email Configuration (see 3.2).
- Daily Trend Alerts job: it runs on the server every morning and emails the new alerts (see 6.13). It is To do when it hasn't run in the last 36 hours: ask Continuum support to check it. At an inactive site it shows Site inactive, as the job leaves inactive sites out.
- Files removed: a file removed from a QA record (a photo, a lab report, a bill of lading, a certificate...) leaves the record, but is kept for the records, at least 2 years (both countries ask for records kept 2 years). The line says how many the site keeps and since when; See them opens the list, the newest first (up to 500), each with what it belonged to (the feature and the record), who added it and when, and who removed it and when. Select a file to download it. Only Quality Control Managers of the site and administrators see them. Before phase 51 is installed on the server, a file removed is deleted, as before.
- Each feature: Still to do lists what is missing, each linked to where to do it. Review the settings: until a feature's settings are saved once, its defaults apply. Turn it on: Lot Disposition, in Change Site Settings. Or add what the feature needs to be of use: the instruments to calibrate, the approved grower list, the controlled documents, the customers and their specs, the quality objectives, the internal audit checklists, the external audit programs, the swab points, the pre-op checklists, the approved labels, the wash points, the trailer checklist, the supplier categories, the metal detectors, the packs checked by weight, the glass and brittle plastic register, the water sources and their tests, the training courses and the workers, the pre-harvest checklist and the fields or the security checklist and the vulnerability assessment. A feature with nothing missing is Ready.

- Locations, Areas and Equipment: To do until the site has at least one Location, Area or Equipment in use, with Add the Locations and Areas the Food Safety app asks for (and the Equipment for repair requests) linked to the page (see 6.72); under its name, how many entries the lists have. A site that doesn't use the Food Safety app can mark it Not used at this site: a copy from another site then leaves the places and each row's Location and Area out.
- Users with the page: how many Users of the site have the feature's page (Quality Control Managers have them all). Give Users the pages they need on Add / Change User Permissions (see 3.3). Under each feature's name is how many records it holds.
- Not installed: the feature isn't installed on the server yet for your company. Continuum support installs it.

ITEMS NOT USED AT A SITE

An item a site doesn't use, such as a feature it has no need for, comes off its checklist:

1. Under the item's Status, select Not used at this site.
2. If you want, write Why (optional).
3. Select Mark as not used.

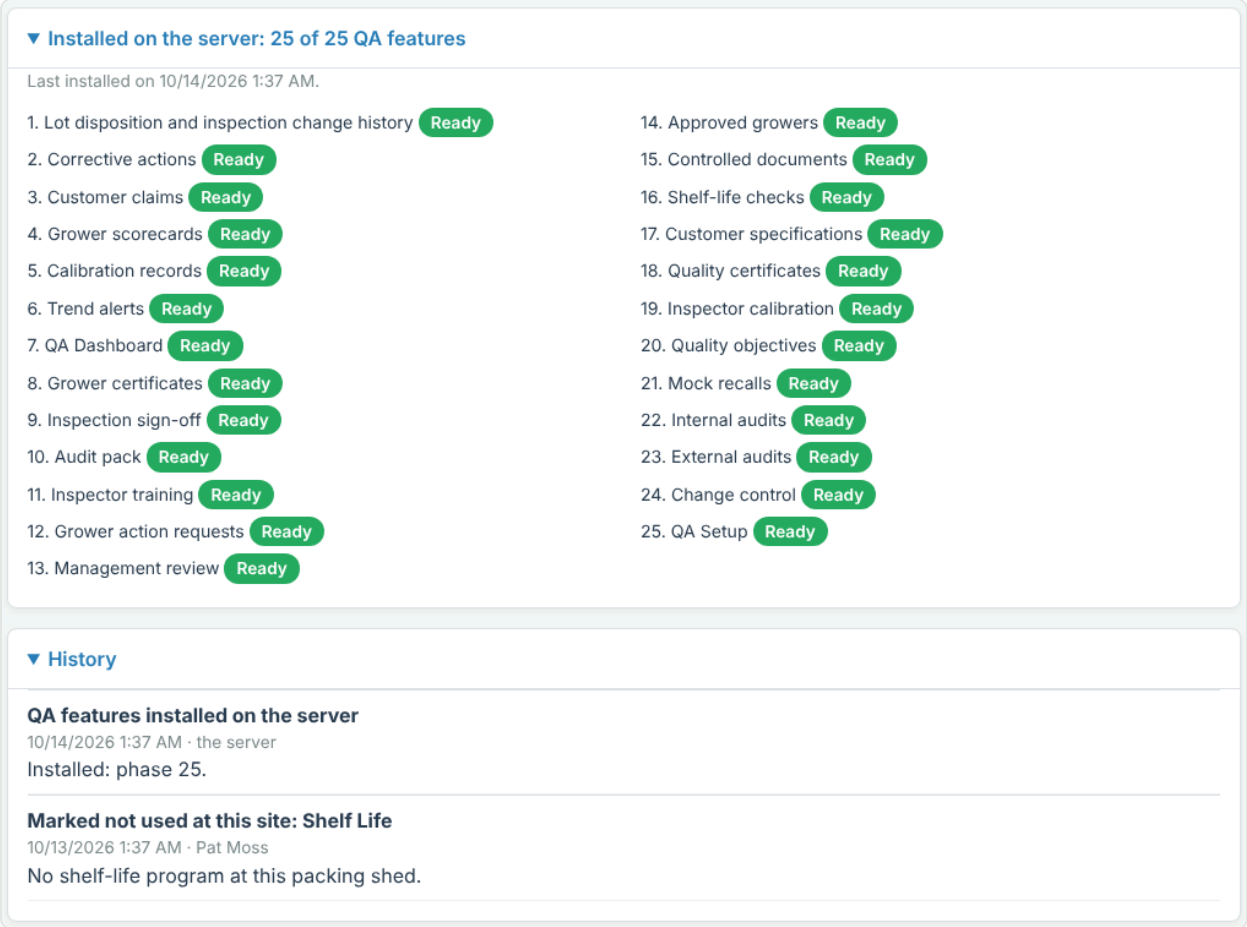
Feature	Still to do	Users with the page	Status
Lot Disposition	• Turn it on in Change Site Settings	0	To do ▸ Not used at this site
Corrective Actions 0 corrective actions	—	0	Ready ▸ Not used at this site
Customer Claims 1 claim	—	0	Ready ▸ Not used at this site
Grower Scorecards	—	0	Ready ▸ Not used at this site
Calibration Records 1 instrument	—	0	Ready ▾ Not used at this site Why (optional) The scales are calibrated t Mark as not used
Trend Alerts	• Review the settings (the defaults apply until they are saved)	0	To do ▸ Not used at this site
QA Dashboard	—	0	Ready ▸ Not used at this site
Grower Certificates 1 certificate	• Review the settings (the defaults apply until they are saved)	0	To do ▸ Not used at this site
Inspection Sign-off	• Review the settings (the defaults apply until they are saved)	0	To do ▸ Not used at this site
Audit Pack	—	0	Ready ▸ Not used at this site
Inspector Training 0 training sessions	• Review the settings (the defaults apply until they are saved)	0	To do ▸ Not used at this site
Grower Action Requests 0 requests	—	0	Ready ▸ Not used at this site
Management Review 0 reviews	• Review the settings (the defaults apply until they are saved)	0	To do ▸ Not used at this site
Approved Growers 0 growers on the list	• Review the settings (the defaults apply until they are saved) • Approve the growers (the approved list)	0	To do ▸ Not used at this site
Controlled Documents 0 documents	• Review the settings (the defaults apply until they are saved) • Add the controlled documents	0	To do ▸ Not used at this site
Shelf Life 0 samples	Marked not used on 10/13/2026 1:37 AM by Pat Moss. No shelf-life program at this packing shed.	0	Not used here Use it again

Features to set up, one not used, and marking another

- The item then shows Not used here, with who marked it, when and why, and no longer counts as to do. Select Use it again to put it back.

- Installed on the server lists the quality assurance features with when they were last installed; a feature partly installed says what it lacks. History lists the items marked and the installs.

> **Note:** At a site in Canada, Mock Recalls can't be marked not used: a recall simulation is required at least once every 12 months (SFCR, section 84). When none has been finished in the last 12 months, its Still to do says so there (finish a mock recall); at a US site it is a recommendation, as the audit schemes (GFSI) ask for one a year.



The features installed, and the history

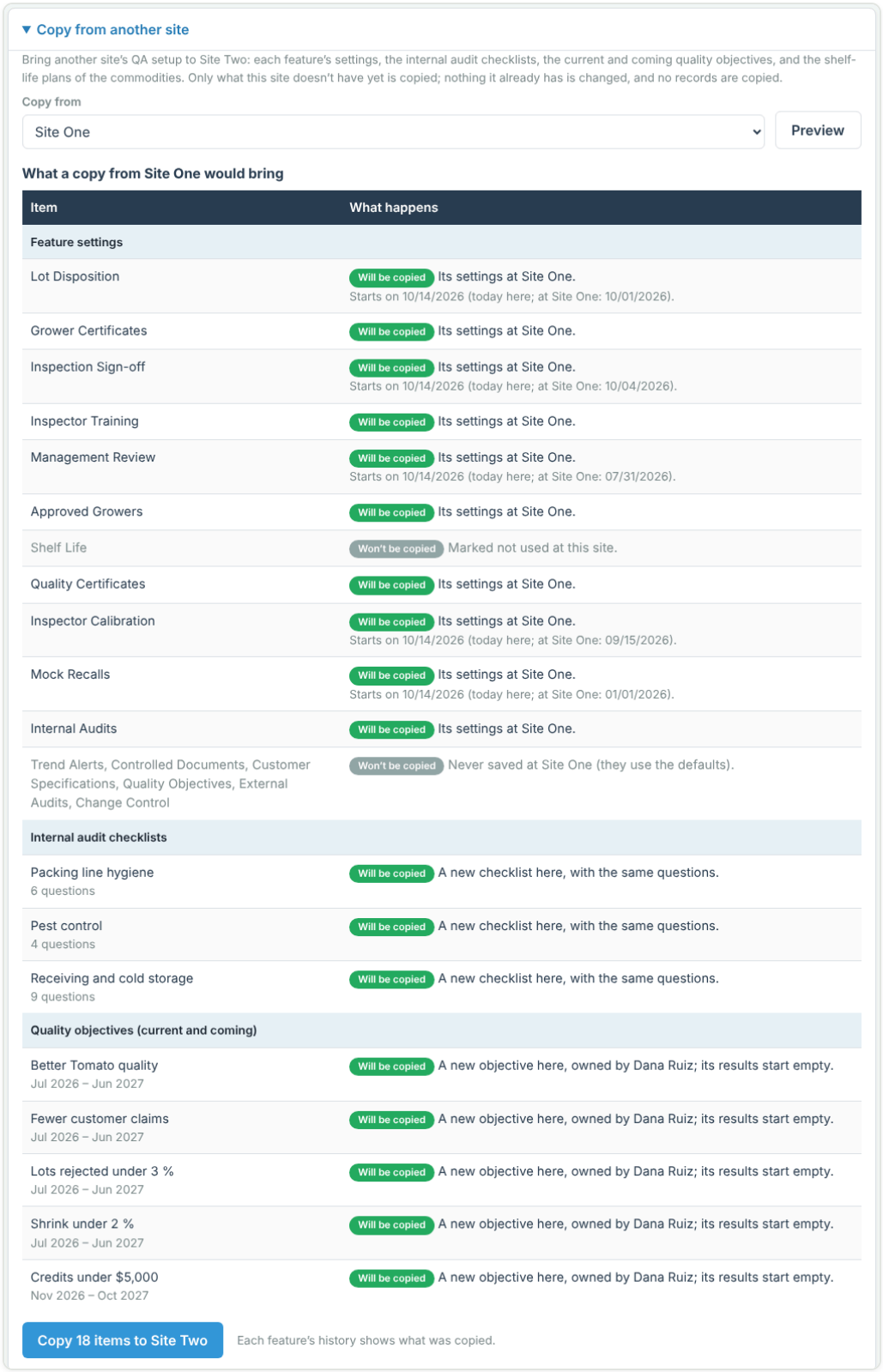
Note: Administrators don't have the quality assurance pages: their checklist says "A QC Manager of the site does this" where a Quality Control Manager follows the link. Both can mark items not used. On the QA Dashboard (6.14), Quality Control Managers see how many items are still to do at the site.

COPYING FROM ANOTHER SITE

A new site can start from the setup of a site you already have: each feature's settings (Lot Disposition turned on included), the internal audit checklists with their questions, the current and coming quality objectives, the shelf-life and sampling plans and temperature limits of the commodities, the places whose temperature is logged, the lab analytes, markets and limits, and the Food Safety app's setup. Only what the site doesn't have yet is copied: nothing it already has is changed, features marked not used there are left out, and no records (inspections, audits, corrective actions, documents and so on) are copied. A Quality Control Manager of both sites, or an administrator, can copy.

Tip: To copy a site's setup to many sites at once, use Site Setup; to replace one feature's settings at other sites, use Apply these settings to other sites... on that feature's Settings (see 6.58).

1. On QA Setup, choose the site to copy to and select Apply Filter.
2. Open Copy from another site, choose the site in Copy from, and select Preview. Nothing is saved yet.
3. Read the preview: each item Will be copied or Won't be copied, with the reason. The features whose settings were never saved at the other site are listed together.
4. Select Copy N items to the site.



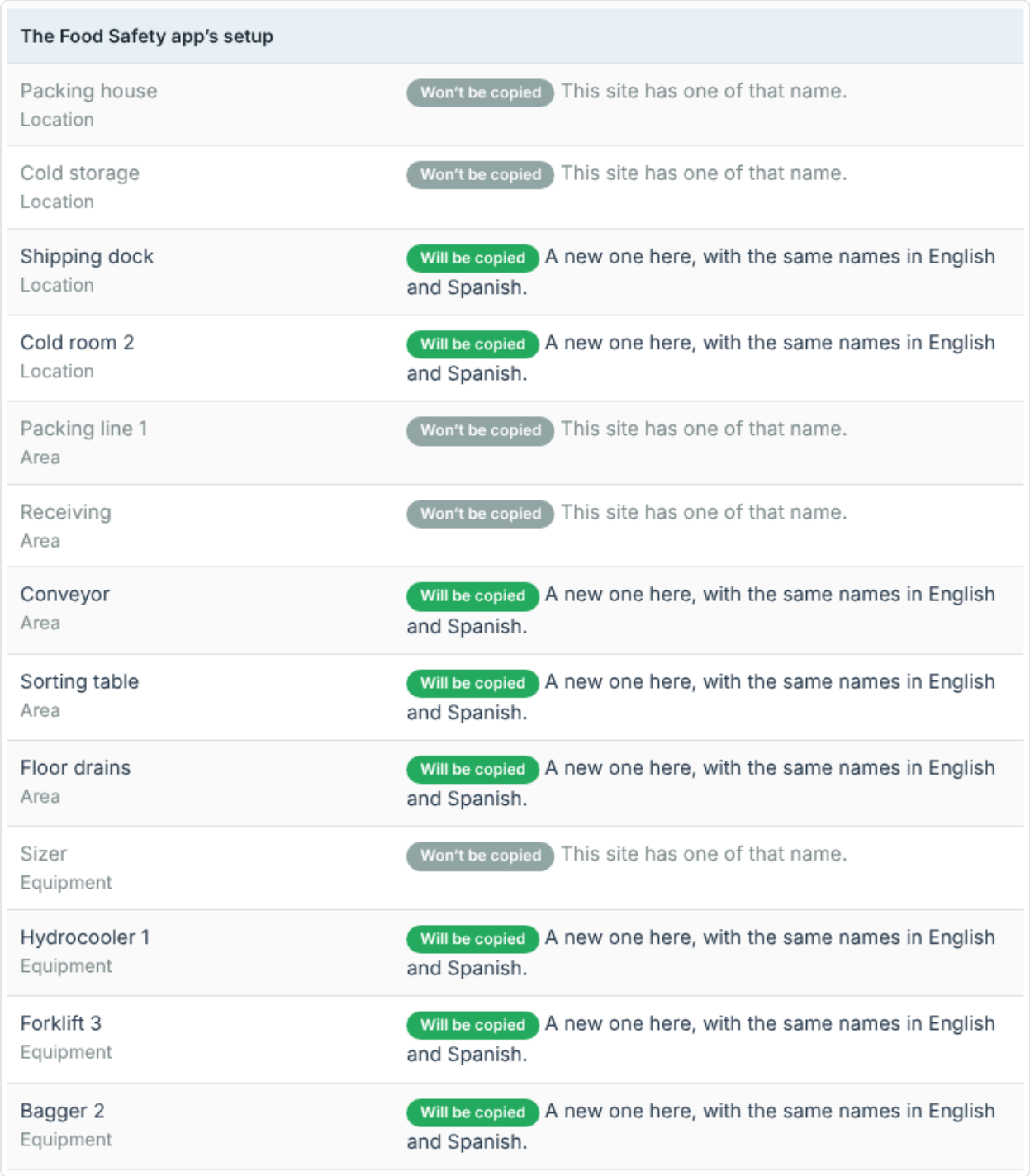
The preview of a copy from another site

- Won't be copied: the site has its own settings, checklist (a checklist of the same name), objective (the same title for the same period) or commodity plan;

the settings were never saved at the other site, so its defaults apply there too; the feature is marked not used at this site; or, for an objective, no one at this site can own it yet (give someone the Quality Objectives page first, see 3.3).

- Dates: a date the other site started from that has already passed, such as when Lot Disposition or Inspection Sign-off began or a schedule started, starts on today at this site, as the preview shows.
- Copied objectives are owned by the same person when that person can own objectives at this site, otherwise by you; their results start empty.
- Afterwards the message says what was copied. The History of QA Setup records the copy, and each feature's own history shows its new settings, checklists and objectives as if saved there.
- If something changed between the preview and the copy, nothing is copied and the preview is shown again: check it and copy again.
- Sampling plans: the plans in force at the other site, for commodities without a plan here, from today. A plan by lot size is copied when this site has a lot size question of the same name for the commodity; otherwise the preview says to set it up here.
- Cold chain: the temperature limits in force at the other site, for commodities without limits here, from today; and its places, with their kind and limits, except those whose name this site already has. No readings are copied, nor what the temperature questions measure (each site has its own questions).
- Lab results: the analytes and markets in use at the other site, except those whose name this site already has (with their kind, result type, unit and default limit); limits are copied only for an analyte with the same result type and unit at both sites; and each commodity's limits, for commodities without limits of their own here, for the analytes and markets both sites then have. No tests are copied.
- The Food Safety app's setup, in a group of its own in the preview: the Locations, Areas and Equipment (see 6.72); the sanitation areas with their checklist items and cleaning tasks, and the cleaning tasks with no area; the glass and brittle plastic areas with their items; the metal detectors; the wash points; the swab points; the instruments in use; the planned maintenance tasks; and each one's Location and Area, matched by name among this site's places, with those of the visitor sign-in and the repair request. One this site

already has of the same name (a swab point: of the same code; a planned task: the same equipment and task) is kept as it is, and a site that picked its own sign-in or repair request Location keeps it. Not copied: records, a wash point’s supplier, a swab point’s place on a floor plan, an instrument’s serial number, location, owner and calibrations. Cleaning tasks start, and planned tasks are first due, today here. Each is added as on its own page, so its history says so. Only a whole copy brings them, not Apply these settings to other sites… on a feature’s Settings.



The Food Safety app's setup in the preview of a copy

CANADAGAP

Once the CanadaGAP module is installed, QA Setup shows the CanadaGAP module card to Quality Control Managers and Administrators: whether it is on, at how many sites, and Change (or Turn on), which opens CanadaGAP Module (see 6.74). At a site that follows CanadaGAP, a CanadaGAP card lists what the site still

has to set up, each Ready or To do and counted in the site's summary: the scope, season start and certificate; the buildings and storages; the production sites with their crop; the product library with PCP # and PHI; the assessment templates; and the pest control plan of each building. Each item opens the page that sets it up. The card isn't shown while the site doesn't follow CanadaGAP.

MEXICO

Once the Mexico module is installed, QA Setup also shows the Mexico module card: whether it is on, at how many sites, and Change (or Turn on), which opens Mexico Module (see 6.81). At a site that follows Mexico, the Mexico items list what the site still has to set up, each Ready or To do: the SENASICA registration, unit code, modalities and people; the site's state on Add / Change Sites, for its time zone; the hazard analyses and technical plan; for the pesticide modules, the input product library with COFEPRIS registrations and safety intervals, and the production sites with their crop; for harvest, the harvest crews; and for Module 4, the buildings with their pest control plan. A site that follows Mexico shows Mexico as its country, and the country chosen underneath comes back when the module is off.

6.33 Sampling Plans

Lots > Sampling Plans sets, for each commodity of a site, how many units to inspect for a lot and how many defects still accept it, and checks every inspection against it. Nothing is blocked: a lot the plan doesn't accept is flagged on the page, on Edit Quality Inspections and Lot Disposition, on Trend Alerts and on the QA Dashboard. Quality Control Managers set up the plans; Users with the Sampling Plans permission see them and the results.

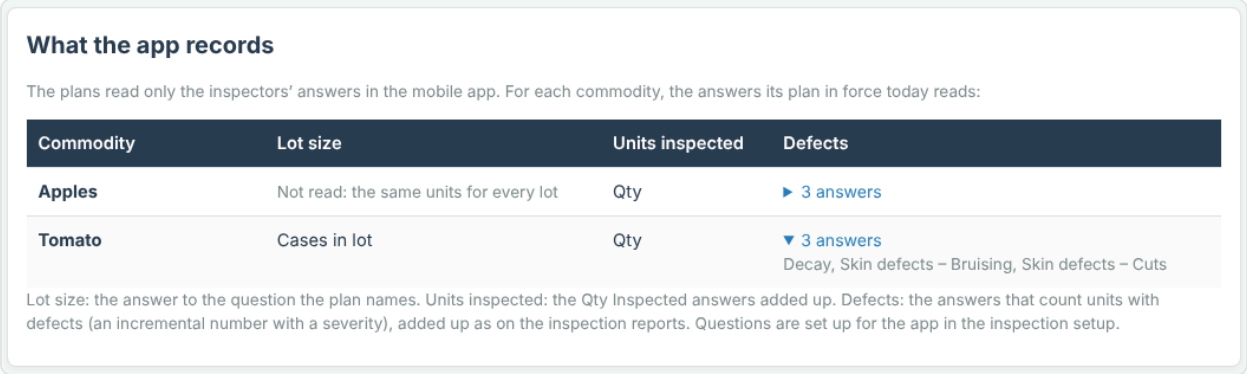
THE LOT SIZE

A plan by lot size needs each inspection to say how big the lot is. Add a number question for it to the inspection's header or footer, such as Cases in lot (Header / Footer Questions), so that it is answered once per lot, counted in the same units as Qty Inspected, and name it in the plan. A question of the body is answered for

each sample, so it isn't offered (a plan that already names one keeps it, marked). Until a commodity has one, its plan can ask for the same units for every lot.

WHAT THE APP RECORDS

The plans read only what inspectors record in the mobile app. Under the plans, the Plans tab shows What the app records: for each commodity, the answers its plan in force today reads. Lot size is the question the plan names (not read by a plan with the same units for every lot); Units inspected are the site's Quantity Inspected questions, added up; Defects are the answers that count units with defects (an incremental number with a severity), added up as on the inspection reports. Anything in red needs a question set up for the app.



What the app records

The plans read only the inspectors' answers in the mobile app. For each commodity, the answers its plan in force today reads:

Commodity	Lot size	Units inspected	Defects
Apples	Not read: the same units for every lot	Qty	▸ 3 answers
Tomato	Cases in lot	Qty	▾ 3 answers Decay, Skin defects – Bruising, Skin defects – Cuts

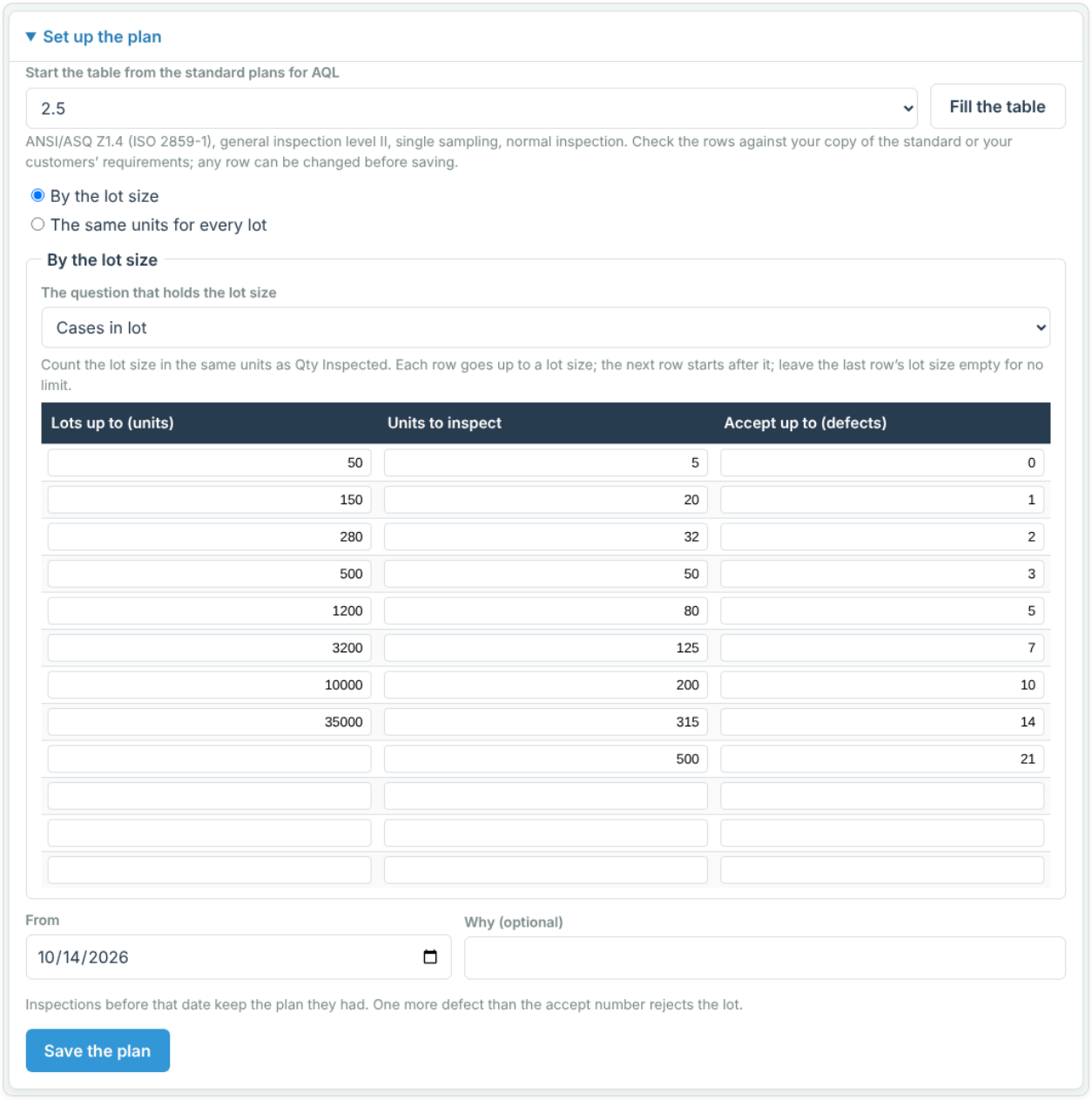
Lot size: the answer to the question the plan names. Units inspected: the Qty Inspected answers added up. Defects: the answers that count units with defects (an incremental number with a severity), added up as on the inspection reports. Questions are set up for the app in the inspection setup.

What the app records for each commodity's plan

SETTING UP A PLAN

1. Go to Lots > Sampling Plans and select Plans. Each commodity of the site shows its plan today and any change coming.
2. Select the commodity. Its plan in force today shows, with the rows of its table.
3. Under Set up the plan (or Change the plan), choose an AQL in Start the table from the standard plans for AQL and select Fill the table to start from the standard plans, if you want.
4. Choose By the lot size and The question that holds the lot size, and check the rows: each row goes up to a lot size (leave the last one empty for no limit), with the Units to inspect and Accept up to (defects). Or choose The same units for every lot, with its units and accept number.

5. Choose From (today, or up to 90 days ahead) and, if you want, Why. Select Save the plan.



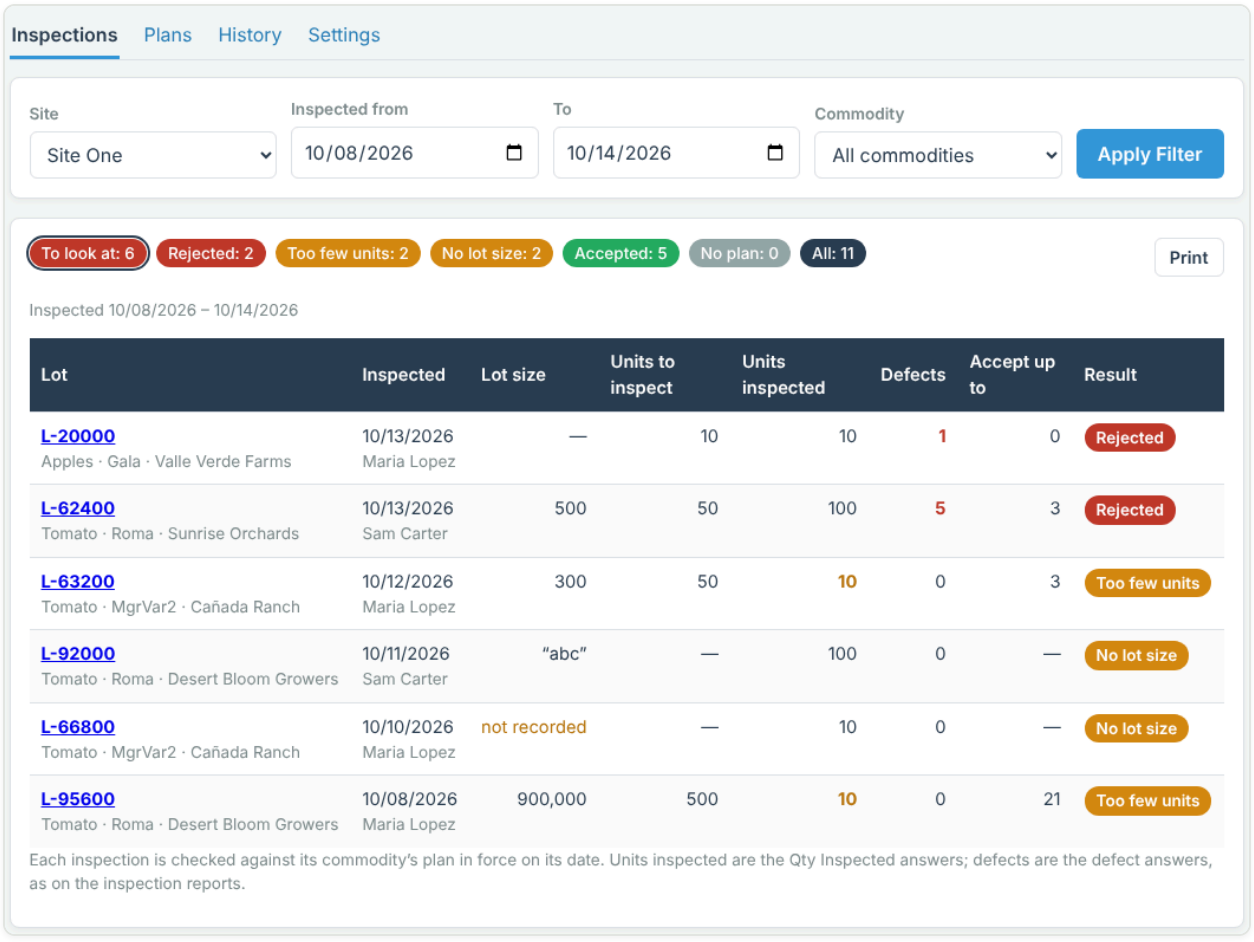
Setting up a commodity's sampling plan from the standard plans

- The standard plans are those of ANSI/ASQ Z1.4 (ISO 2859-1), general inspection level II, single sampling, normal inspection, for AQL 0.65, 1.0, 1.5, 2.5, 4.0 or 6.5. Check the rows against your copy of the standard or your customers' requirements; any row can be changed before saving.
- One more defect than the accept number rejects the lot. A lot no bigger than the units to inspect is inspected whole.

- Each change is a new version from its date: inspections before it keep the plan they had. A change not yet in force can be withdrawn (Withdraw this change). No plan from the date below stops checking the commodity from that date.
- Earlier versions and the plan's History are kept. If someone else changed the plan first, you are told, and the plan shows as it is now.

CHECKING THE INSPECTIONS

The Inspections tab lists the inspections of a period (the last 7 days to start with) and how each stands against its commodity's plan in force on its date. Choose the Inspected from and To dates and a commodity, and select Apply Filter; select a count to see only those inspections.

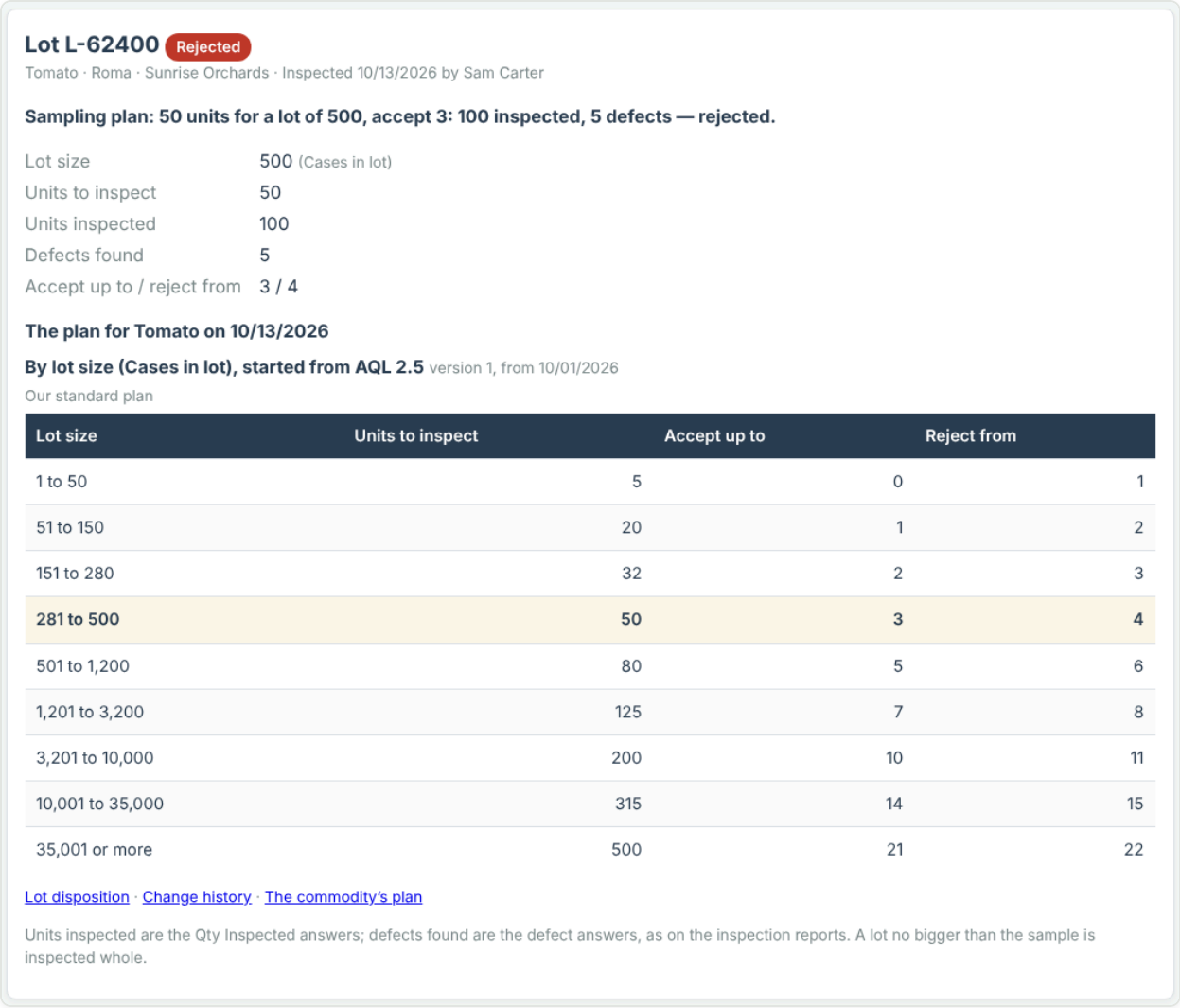


The inspections to look at, against their sampling plans

- Accepted: enough units inspected (the Qty Inspected answers), and the defects found (the defect answers, as on the inspection reports) up to the accept number.

- Rejected: enough units, and more defects than the plan accepts.
- Too few units: fewer units inspected than the plan asks.
- No lot size: the plan needs the lot size, and the inspection doesn't answer it with a whole number (or the size is outside the plan's table).
- No plan: the commodity had no plan on that date. The list names the commodities inspected without one.

Select a lot to see its numbers and the plan it was checked against, with the row it used marked.



Lot L-62400 Rejected

Tomato · Roma · Sunrise Orchards · Inspected 10/13/2026 by Sam Carter

Sampling plan: 50 units for a lot of 500, accept 3: 100 inspected, 5 defects — rejected.

Lot size	500 (Cases in lot)
Units to inspect	50
Units inspected	100
Defects found	5
Accept up to / reject from	3 / 4

The plan for Tomato on 10/13/2026

By lot size (Cases in lot), started from AQL 2.5 version 1, from 10/01/2026

Our standard plan

Lot size	Units to inspect	Accept up to	Reject from
1 to 50	5	0	1
51 to 150	20	1	2
151 to 280	32	2	3
281 to 500	**50**	**3**	**4**
501 to 1,200	80	5	6
1,201 to 3,200	125	7	8
3,201 to 10,000	200	10	11
10,001 to 35,000	315	14	15
35,001 or more	500	21	22

Lot disposition · Change history · The commodity's plan

Units inspected are the Qty Inspected answers; defects found are the defect answers, as on the inspection reports. A lot no bigger than the sample is inspected whole.

One inspection against its sampling plan

> **Note:** The Settings (Quality Control Managers) say whether Trend Alerts reports the inspections rejected by their plan and those not sampled as it asks (see 6.13). The History lists the plans set up, changed and withdrawn. QA Setup (6.32) shows the plans still to set up at each site.

6.34 Cold Chain

Lots > Cold Chain checks temperatures against limits in two places, both from the inspections the mobile app uploads: the storage log, the temperatures of the trailers, cold rooms, docks or containers that inspectors record in the app (such as its Trailer Temp question), against that place's limits; and the lots, whose inspection temperature answers (such as pulp temperature) are checked against their commodity's limits. Nothing is blocked: what is out of range is flagged on the page, on Edit Quality Inspections and Lot Disposition, on Trend Alerts and on the QA Dashboard. Quality Control Managers set the limits, the places and what each temperature question measures; Users with the Cold Chain permission see the results and say what was done on the readings they took.

THE UNIT AND THE PLACES

1. Go to Lots > Cold Chain and select Settings. Choose whether temperatures are shown in °F or °C at the site, and select Save. A site that was running before the country came in keeps °F until this is changed; a site added since uses its country's unit until the settings are saved: °C in Canada, °F in the United States (see 6.32). Temperatures are kept in °F, so changing it later only changes how they are shown. A temperature question without a °F or °C unit of measure, such as the app's Trailer Temp, is read in this unit.
2. Select Places, then Add a place. Type its Name, choose its Kind (Cold room, Dock, Trailer or container, Other), and type its Lowest and/or Highest temperature (leave one empty for no limit on that side). Select Add the place. For the trailers, add one place of the kind Trailer or container, such as Trailers, with their limits.
3. To change a place, or stop logging it (its readings are kept), select Change under its name.

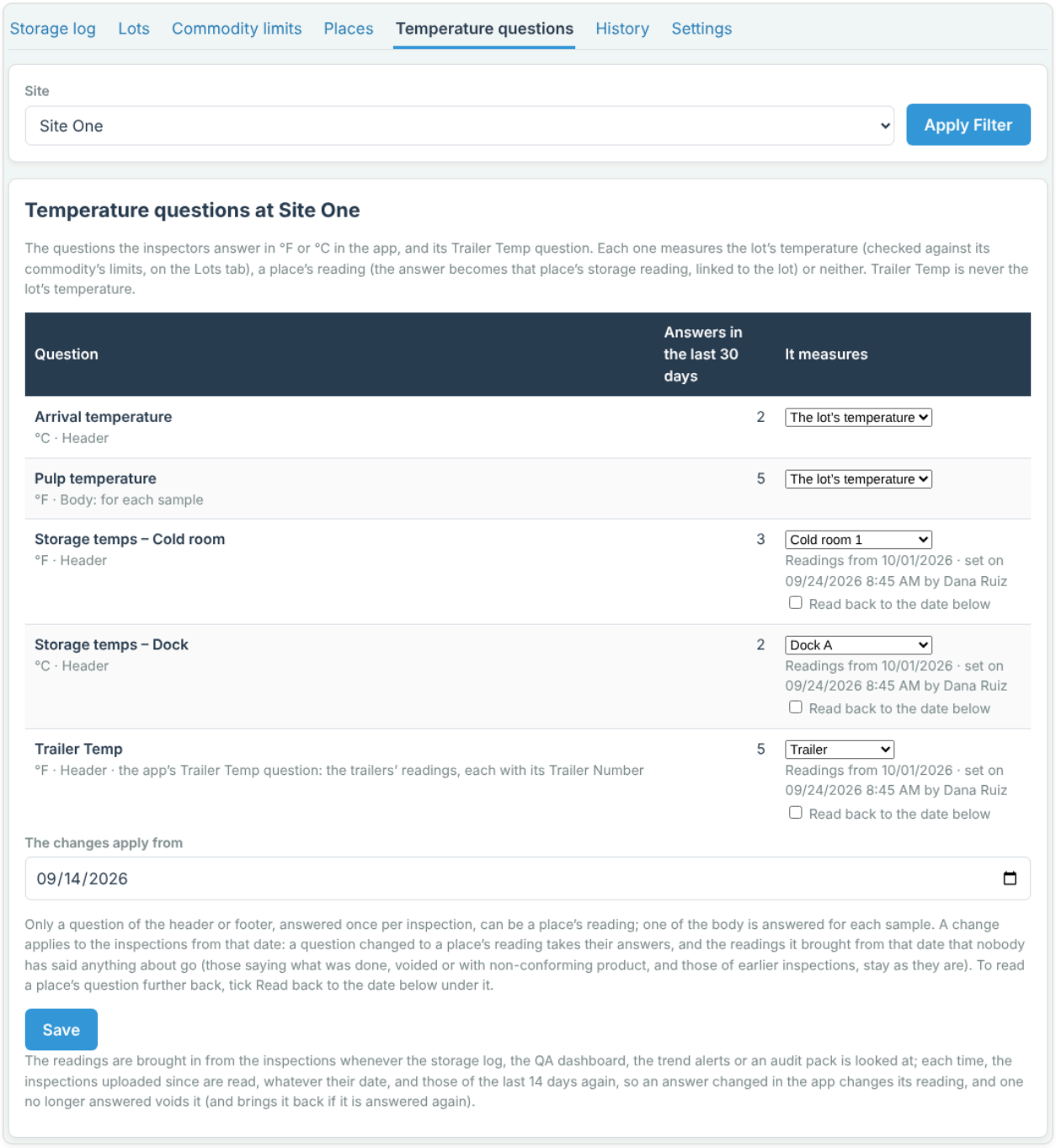
Recorded in the app as shows the questions whose answers are each place's readings; Its readings opens them on the storage log.

TEMPERATURE QUESTIONS FROM THE APP

The Temperature questions tab lists the questions inspectors answer in °F or °C in the app, and the app's Trailer Temp question, with where the inspection asks each one (Header, Body: for each sample, or Footer) and how many times it was answered in the last 30 days. Each one measures:

- The lot's temperature: checked against its commodity's limits (see Commodity Temperature Limits, below). Every question starts this way, except Trailer Temp.
- A place's reading: each answer becomes a reading of that place on the storage log, with its lot. Only a question of the header or footer, answered once per inspection, can be a place's reading; Trailer Temp always can.
- Not used: neither.
- Trailer Temp is never the lot's temperature, and isn't read until it is set (Not set yet: choose...): set it to the trailer place, or to Not used if the site doesn't log trailers.

1. Select Temperature questions (Quality Control Managers).
2. For each question, choose what It measures: The lot's temperature, a place (under A place's reading), or Not used. Set Trailer Temp to the trailer place.
3. Choose The changes apply from (30 days back to start with, up to a year), and select Save. A question changed to a place's reading takes the answers of the inspections from that date.



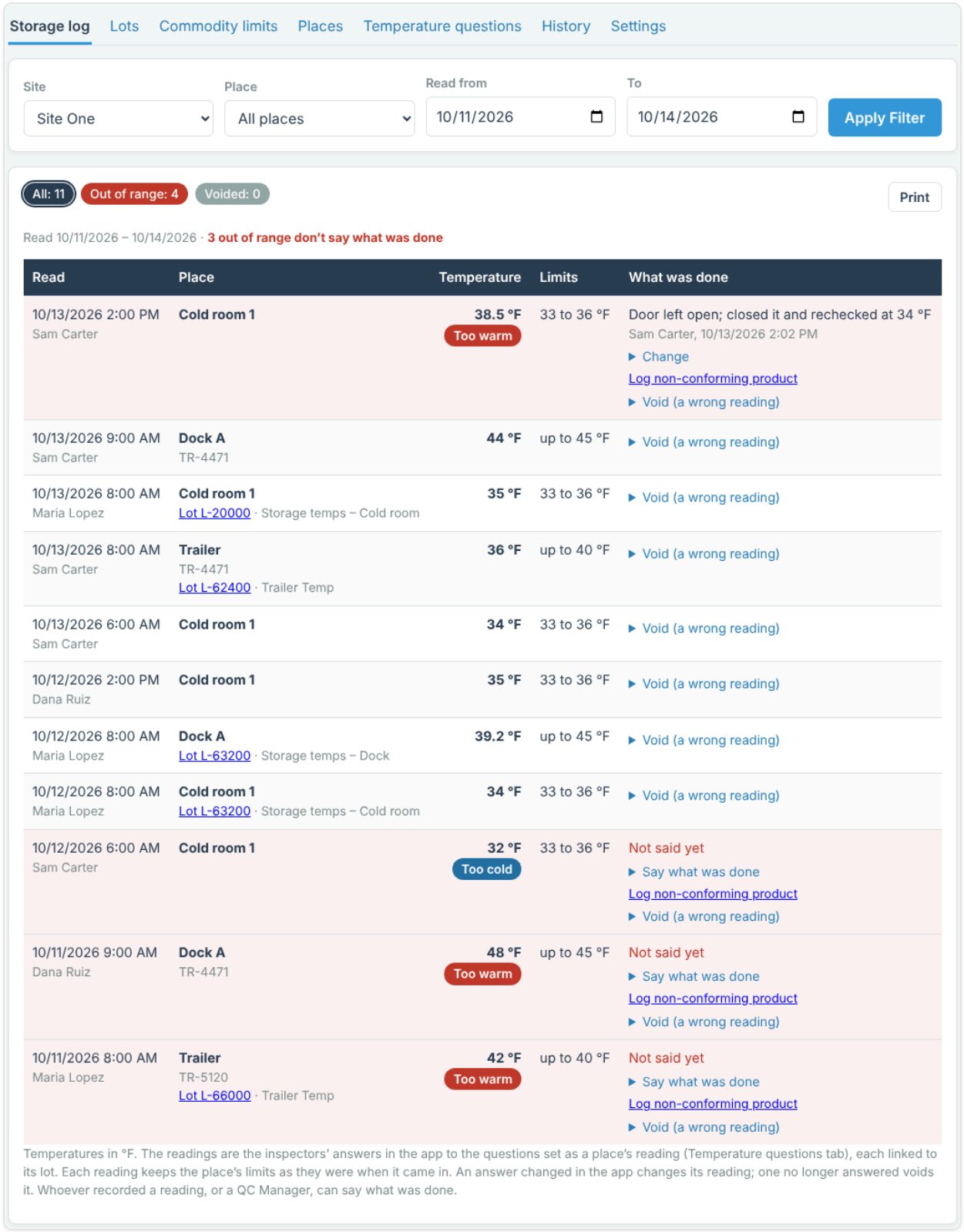
What each temperature question measures

- A change applies to the inspections from that date: the readings the question brought from it that nobody has said anything about are voided, in your name, with the reason (they are kept: Voided on the log shows them); those saying what was done, voided, or with a non-conforming product record, and those of earlier inspections, stay as they are.

- To read a place’s question further back, tick Read back to the date below under it, choose the date and select Save.
- Each site has its own questions, so copying a site’s setup (6.32) doesn’t copy this.

THE STORAGE LOG

The Storage log tab lists the readings of a period (the last 7 days to start with), newest first. Choose a place and the dates, and select Apply Filter; select a count to see only those readings. There is nothing to type in: the readings come in from the inspections each time the log, the QA Dashboard, Trend Alerts, an audit pack or a management review is looked at, including inspections uploaded late.



The storage log, with the readings from the app

- Each reading shows when it was read (the inspection's date and time) and by whom (the inspector), the place, and the lot and question it came from, with a

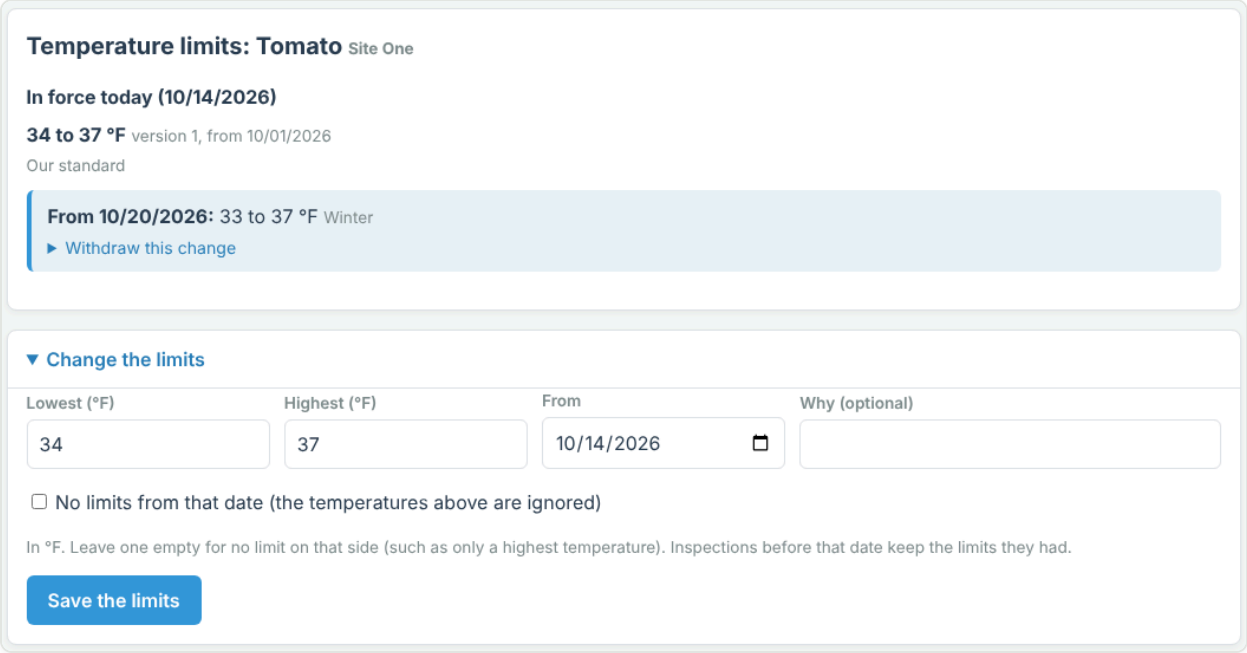
trailer’s Trailer Number (or Container number) from the same inspection. Select the lot to open it.

- A reading out of the place’s limits shows Too cold or Too warm, and is listed under Out of range. Each reading keeps the place’s limits as they were when it came in.
- The last 14 days of inspections are read again each time: an answer changed in the app changes its reading (the History says so); one no longer answered, or no longer a temperature, voids it, saying No longer answered in the inspection, until it is answered again. A Trailer Number or lot number changed in the app is updated too.
- Whoever recorded a reading (the inspector), or a Quality Control Manager, can select Say what was done on it. Those out of range still not saying what was done are counted above the list.
- A Quality Control Manager can void a wrong reading (Void (a wrong reading)), saying why; it stays on the Voided list, and reading the app again doesn’t bring it back.
- A reading out of range has Log non-conforming product, to record the product it affected (see 6.35); the record is on the reading’s lot, and the reading then lists its records.
- Readings typed in on this page before it read them from the app stay in the log and the History.

COMMODITY TEMPERATURE LIMITS

A lot’s temperatures are its inspection’s answers to questions whose unit of measure is °F or °C, such as a pulp temperature question, except the app’s Trailer Temp and the questions set as a place’s reading or not used (see Temperature Questions from the App). A temperature question without one of those units isn’t read: give it the unit on Add / Change Inspection Questions.

1. Select Commodity limits. Each commodity of the site shows its limits today and any change coming.
2. Select the commodity, then Set the limits (or Change the limits).
3. Type the Lowest and/or Highest temperature, choose From (today, or up to 90 days ahead) and, if you want, Why. Select Save the limits.

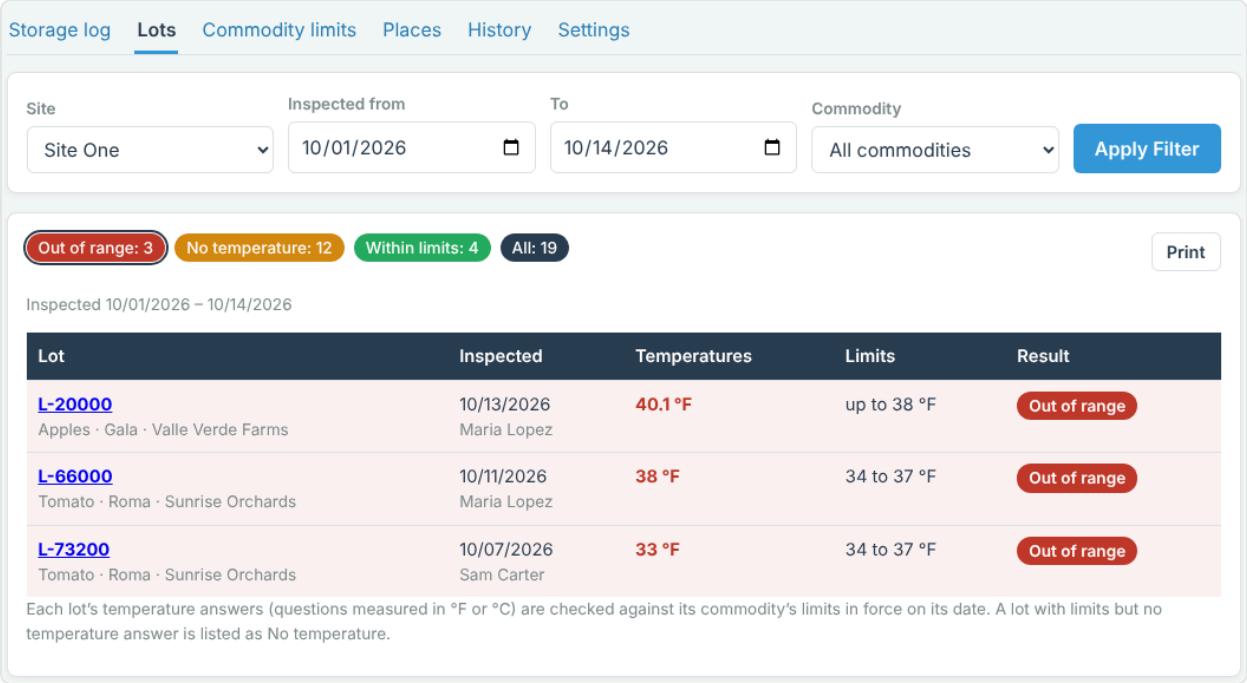


A commodity's temperature limits, with a change coming

- Each change is a new version from its date: inspections before it keep the limits they had. A change not yet in force can be withdrawn (Withdraw this change). No limits from that date stops checking the commodity from that date.
- If someone else changed the limits first, you are told, and the limits show as they are now.

THE LOTS' TEMPERATURES

The Lots tab lists the inspections of a period (the last 7 days to start with) with their temperatures against the limits in force on their date. Choose the dates and a commodity, and select Apply Filter; select a count to see only those lots.



The lots' temperatures against their commodities' limits

- Within limits: every temperature answered is within the limits.
- Out of range: a temperature answered is below the lowest or above the highest.
- No temperature: the commodity has limits, but the inspection answers no temperature question.

Select a lot to see each temperature question it answered, with the °C answered when it was, and the storage readings its inspection recorded.

> **Note:** The Settings (Quality Control Managers) also say whether Trend Alerts reports the lots and storage readings out of range (see 6.13). The History lists the changes of limits, places, temperature questions and settings, and the readings out of range, changed in the app, noted and voided. QA Setup (6.32) shows the sites whose places and temperature questions are still to set.

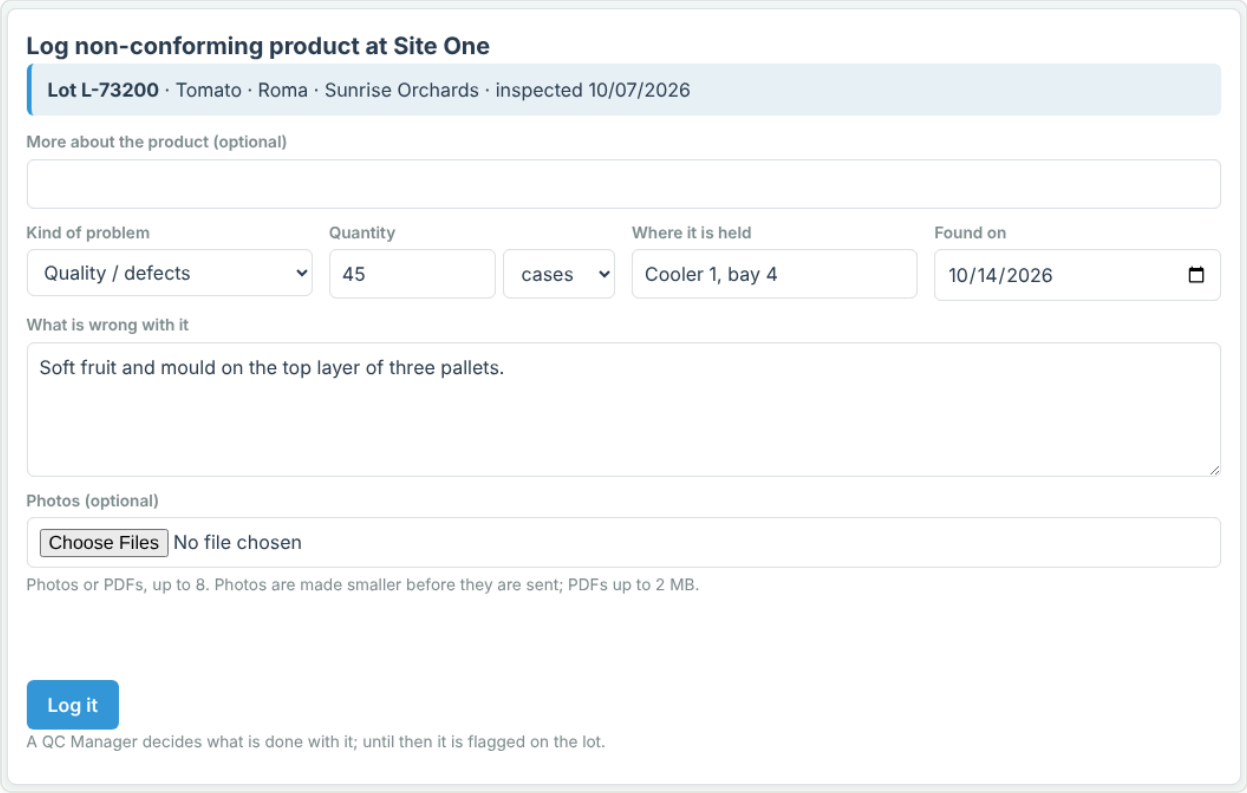
6.35 Non-Conforming Product

Problems > Non-Conforming Product logs product found not to meet requirements (a lot, part of one, or stock): what is wrong, how much, where it is held, with photos; then what a Quality Control Manager decides is done with it, and what was actually done. Nothing is blocked: a lot with a record not closed is flagged on Edit Quality Inspections and Lot Disposition, and records waiting too long on Trend Alerts and the QA Dashboard. Users with the Non-Conforming Product permission log records and see them; Quality Control Managers decide, close and void them.

LOGGING NON-CONFORMING PRODUCT

1. Start from where the product was found: Log non-conforming product among a lot's links on Edit Quality Inspections, on a customer claim (6.10), on a cold chain reading out of range (6.34), or on a failed lab test (6.38). Or go to Problems > Non-Conforming Product and select Log non-conforming product.
2. From a lot, or a cold chain reading taken in the app, its lot number, commodity and grower are filled in. Otherwise, type the Product: what it is and how it is packed, such as Roma tomatoes, 25 lb cartons, pallet 22.
3. Choose the Kind of problem, type the Quantity and choose its unit (cases, cartons, pallets, bins, lb, kg or units), and type Where it is held.
4. Check Found on (today, or up to 7 days ago), describe What is wrong with it, and add Photos if you have them.
5. Select Log it. The record gets its number, such as NC-12, and waits for a decision.

> **Tip:** When the product has already left the site, a Quality Control Manager selects Start a recall (the product has left the site) on the record: the recall starts with its lot and what is wrong (see 6.39).

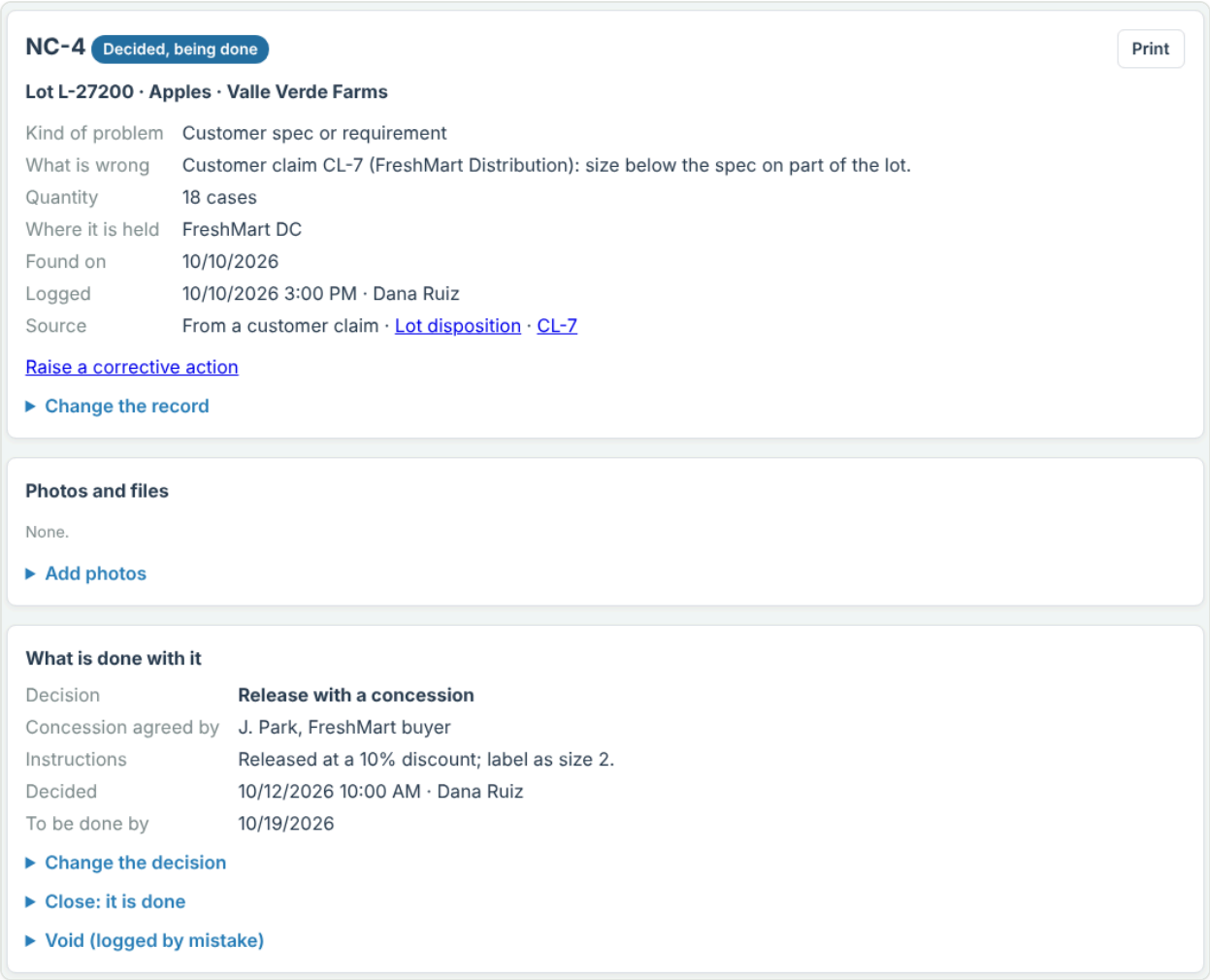


Logging non-conforming product from a lot

> **Note:** Whoever logged a record, or a Quality Control Manager, can change it (Change the record) and add or remove photos until it is closed.

DECIDING AND CLOSING

1. Open the record (Problems > Non-Conforming Product lists those not closed). A record waiting for you shows the Decide form.
2. Choose What is done with it: Rework or re-sort, Regrade / downgrade, Return to the grower, Dump or destroy, Release with a concession, or Other. For a concession, type who agreed to it (the customer, or who in the company); for Other, say what is to be done.
3. Type the Instructions (how, by whom, any condition), and select Save the decision. Until it is closed, the decision can be changed (Change the decision).
4. Once it is done, select Close: it is done, type What was actually done, the day and, if you want, the quantity it was done to, and select Close the record.

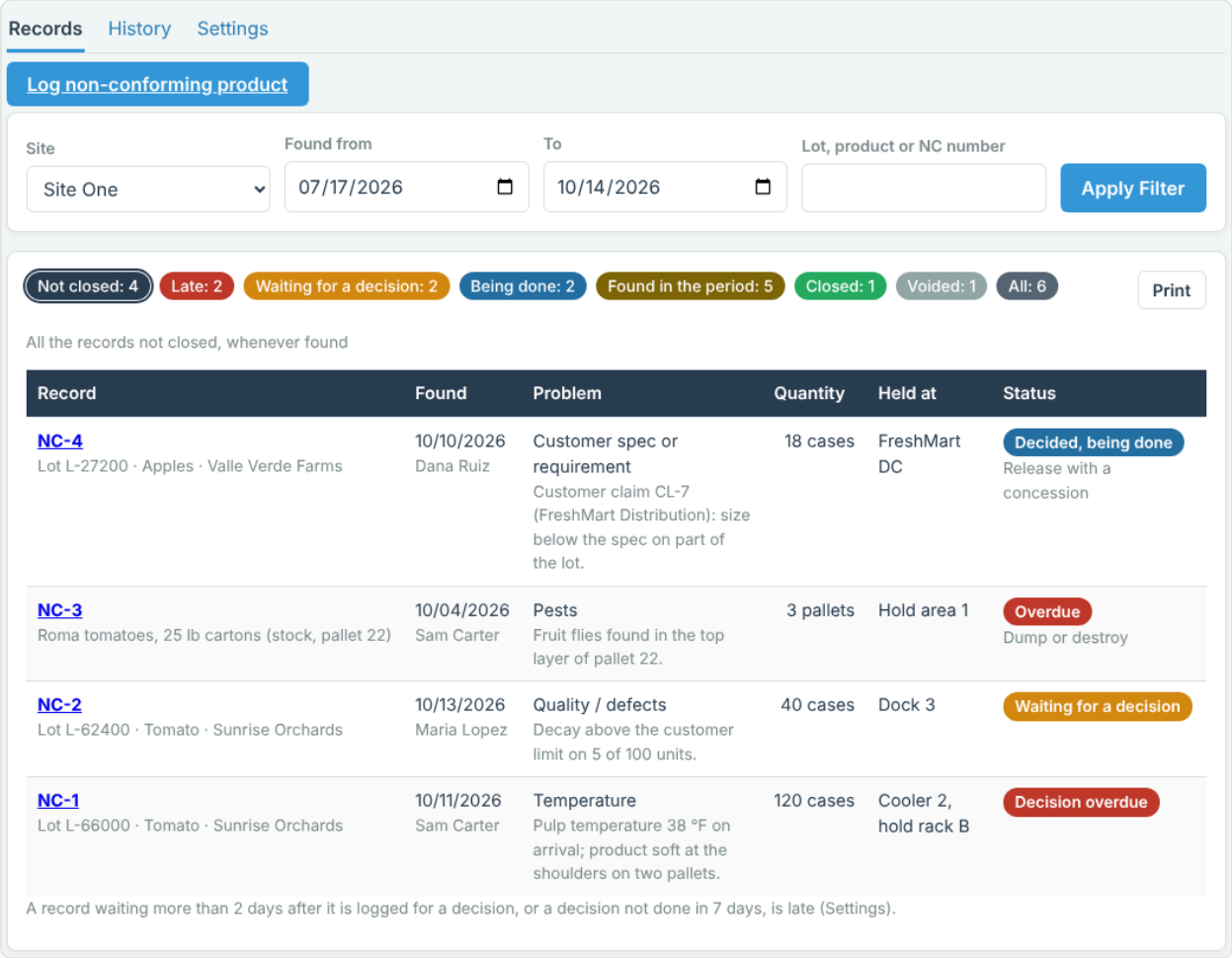


A non-conforming product record with its decision

- A record waiting longer than the site's days to decide, or a decision not done in the site's days, is late (Settings: 2 and 7 days to start with).
- Void (logged by mistake) takes a record out, saying why; it stays on the Voided list.
- Raise a corrective action (whoever logged it, or a Quality Control Manager) starts one from the record (see 6.9).

THE RECORDS

Problems > Non-Conforming Product lists the records not closed, whenever they were found. Select a count to see only those Late, Waiting for a decision or Being done, or the Closed, Voided or All of a period (Found from and To); search by lot, product or NC number.



The non-conforming product records not closed

> **Note:** The Settings (Quality Control Managers) say how many days a record has for a decision and to be done, and whether Trend Alerts reports late records (see 6.13). The History lists what was logged, changed, decided, closed and voided.

6.36 Risk Register

Problems > Risk Register keeps the site's food safety and quality risks: what could go wrong, where and why; how likely and how bad it would be, before the controls and with them; the controls in place; any further action planned; who looks after each risk; and when it is next reviewed. Food safety standards such as PrimusGFS, SQF and BRCGS, and ISO 9001, ask for this kind of risk assessment, kept up to date. Each risk also shows what happened on it lately, taken from the

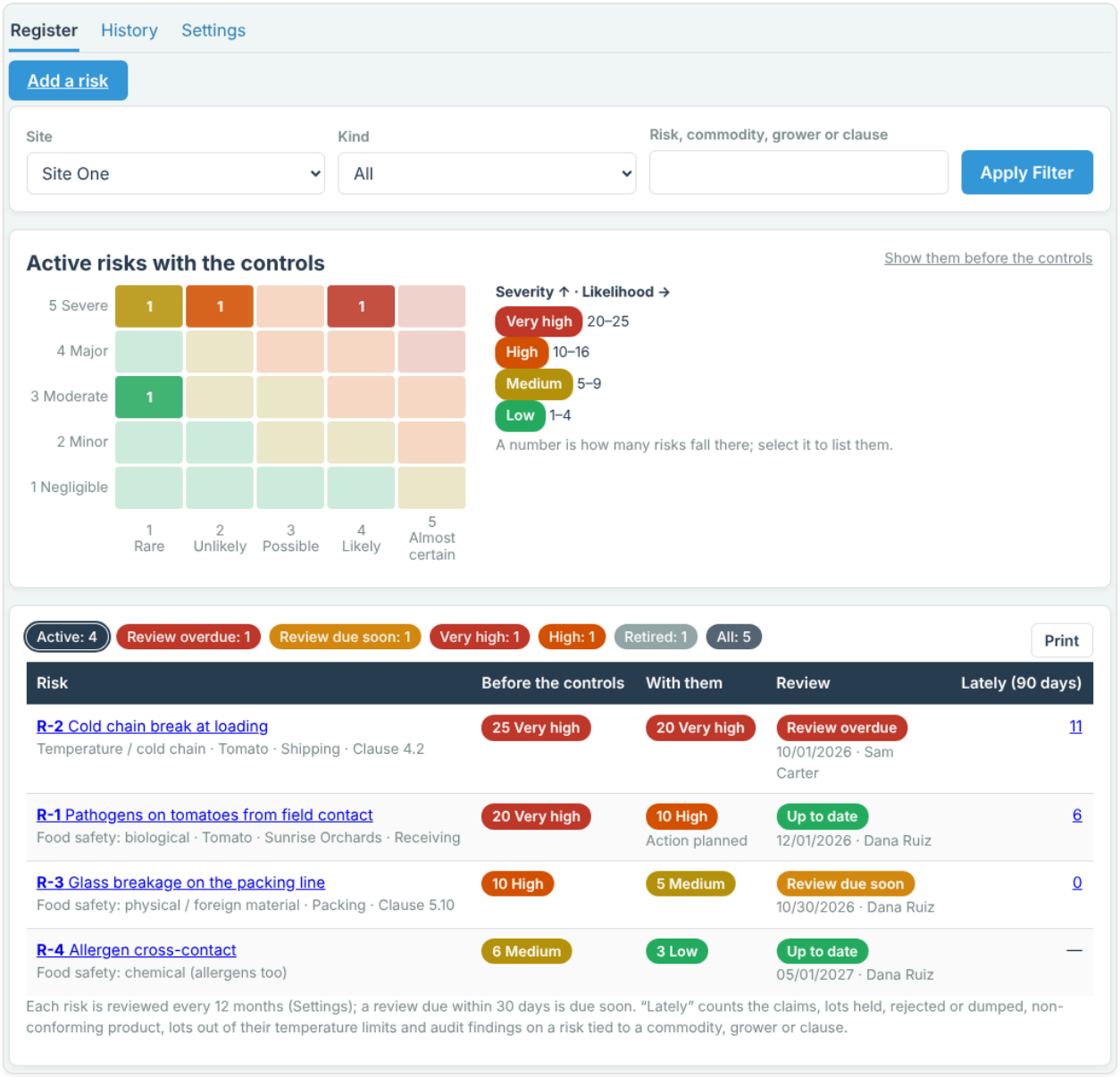
other QA pages. Quality Control Managers add, change, review and retire risks; Users with the Risk Register permission see the register and change nothing.

HOW RISKS ARE SCORED

Each risk gets two numbers from 1 to 5: Likelihood (1 Rare, 2 Unlikely, 3 Possible, 4 Likely, 5 Almost certain) and Severity (1 Negligible, 2 Minor, 3 Moderate, 4 Major, 5 Severe). Their product is the score, from 1 to 25: 1–4 Low, 5–9 Medium, 10–16 High, 20–25 Very high. A risk is scored twice: Before the controls, as if nothing were done about it, and With the controls in place. The score with the controls can’t be higher than without them.

ADDING A RISK

1. On Problems > Risk Register, select Add a risk.
2. Type the Risk, a short name such as Cold chain break at loading, and choose its Kind: food safety (biological; chemical, allergens too; physical or foreign material), product quality, temperature or cold chain, supplier or grower, food fraud or food defence, a customer or regulatory requirement, or other.
3. Tie it to what it is about, if you want: a Commodity, a Grower, Where or when (receiving, cooling, storage, packing, shipping…), and a Clause or audit section of the standard you are audited against. They decide what the risk shows under What happened on it lately.
4. Choose who it is Looked after by, and describe What could happen, and why, the Controls in place and any Further action planned.
5. Choose the Likelihood and Severity Before the controls and With the controls. The score shows as you choose.
6. Check the Next review (a year on to start with) and select Add the risk. It gets its number, such as R-12; this first assessment is its first review.



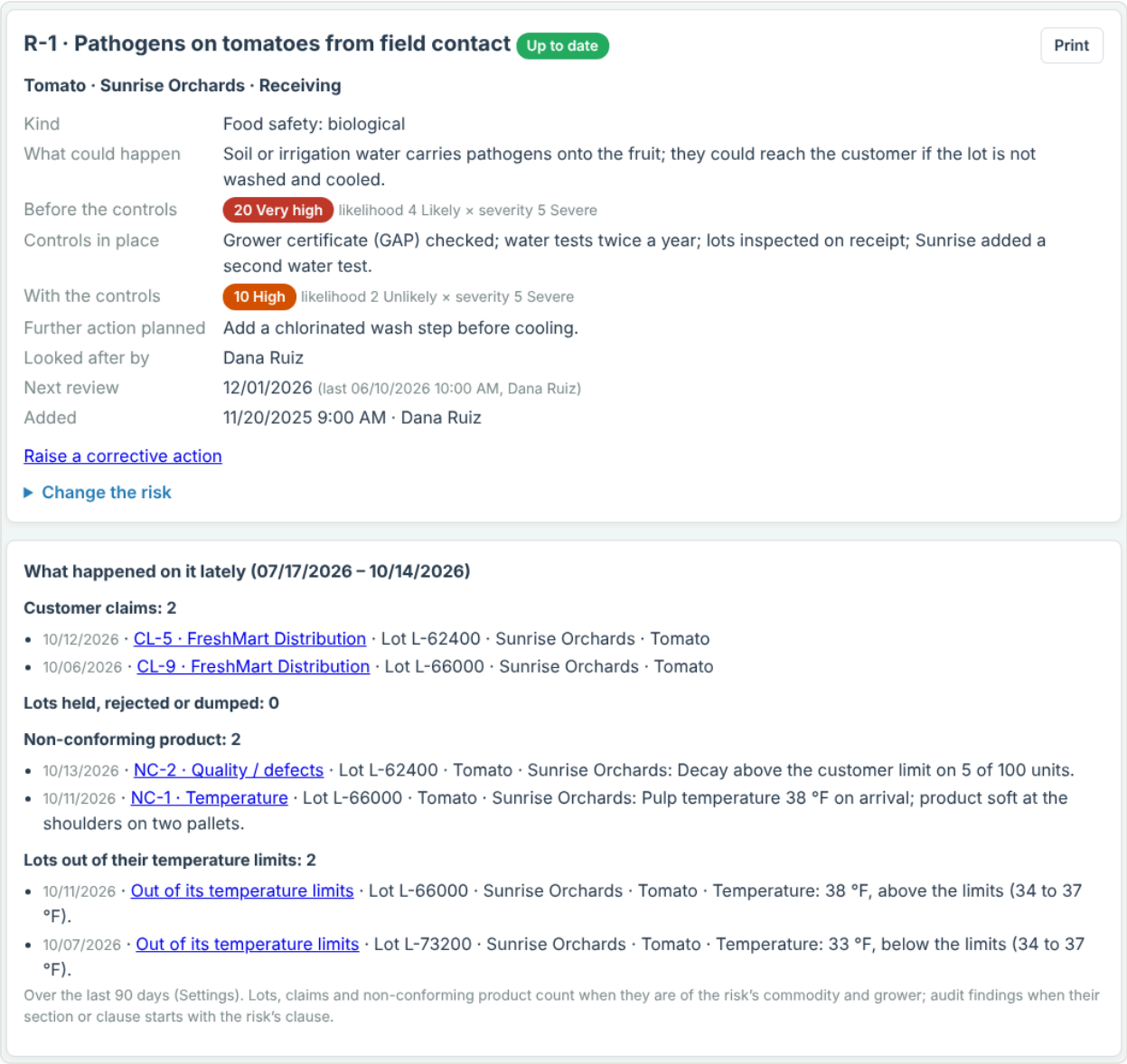
The risk register

THE REGISTER

The grid at the top places the active risks by likelihood (across) and severity (up), with their controls; Show them before the controls places them by their scores without. Each number is how many risks fall in that cell: select it to list them. Below, select a count to see only those whose Review is overdue or due soon, those Very high or High with their controls, the Retired ones or All; choose a Kind or search by name, commodity, grower or clause. The list puts the highest first, with both scores, the review and who looks after each risk, and Lately: how many things happened on the risk over the days looked back.

REVIEWING A RISK

1. Open the risk. Under What happened on it lately, look over what happened on it: for a risk tied to a commodity or a grower, the customer claims, the lots held, rejected or dumped, the non-conforming product, the lots out of their temperature limits and the failed lab tests; for one tied to a clause, the internal audit findings and external audit non-conformances under it. Each item links to its page.
2. Under Reviews, select Review the risk now (it is open already when the review is overdue).
3. Choose the Likelihood and Severity as they are now, before the controls and with them, and change the Controls in place if they have changed.
4. Type What was looked at: what happened lately, and whether the controls work.
5. Check the Next review and select Save the review. The review is added to the risk’s list, with its scores; a review that changed a score says so.



A risk with what happened on it lately

- Change the risk changes what it says; the scores change only at a review.
- Retire (no longer relevant) takes a risk off the register, saying why; Put back on the register brings it back, due for a review that day.
- Raise a corrective action starts one from the risk, for a further action to follow up with an owner and a due date (see 6.9).
- A clause takes its sub-clauses: a risk with clause 2.04 shows findings under 2.04, 2.04.01 or 2.04 Receiving, but not 2.041.

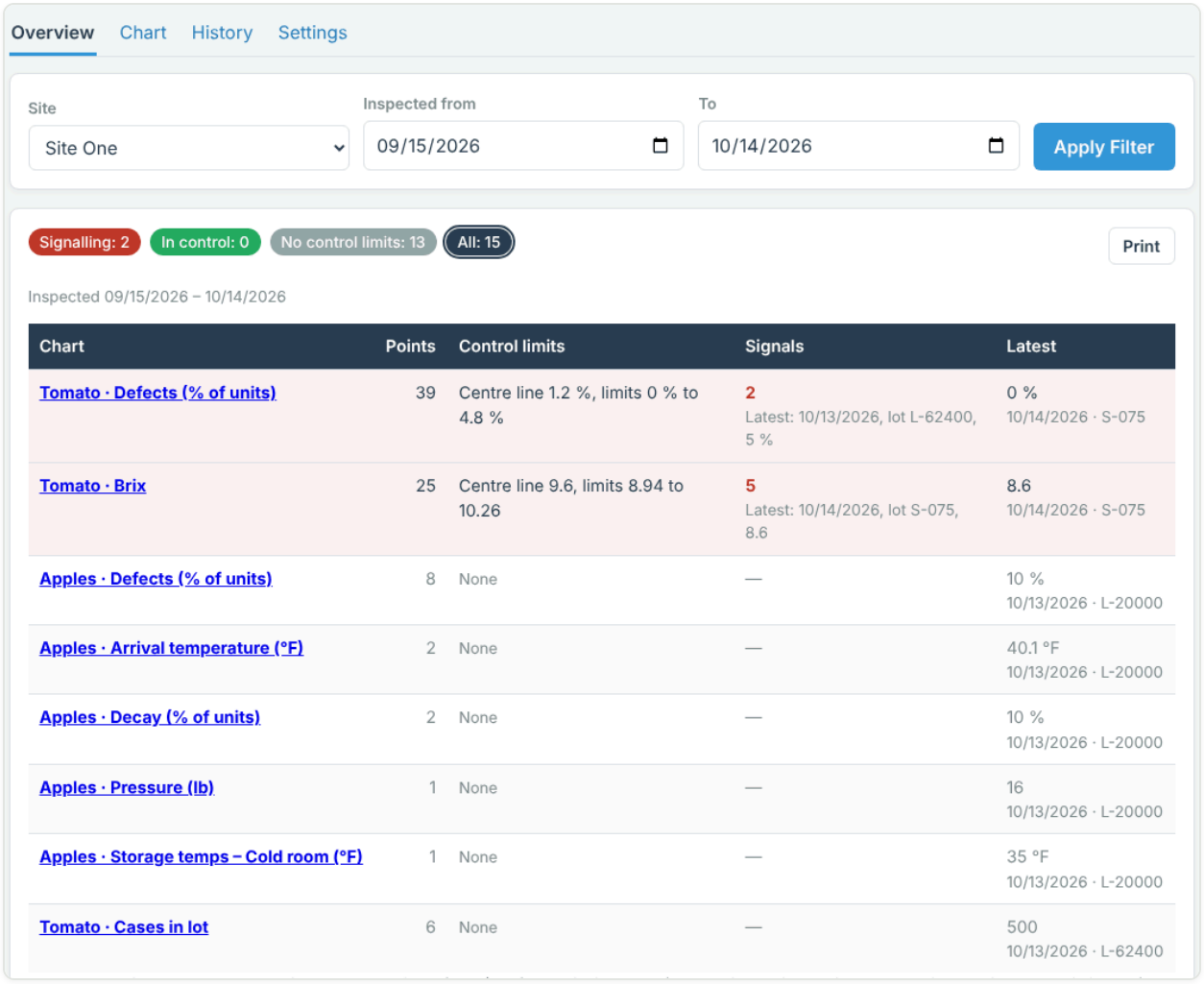
> **Note:** The Settings (Quality Control Managers) say how many months there are between reviews (12 to start with), how many days before it a review is due soon (30), how many days What happened on it lately looks back (90), and whether Trend Alerts reports the risks overdue for their review and those very high with their controls (see 6.13). The History lists what was added, changed, reviewed, retired and put back.

6.37 Control Charts

Lots > Control Charts watches the numbers the inspectors already record in the app, inspection after inspection: for each commodity, a chart of its defects (the percentage of the units inspected found with defects) and one of each question answered with a number, such as Brix, pressure, pulp temperature or Trailer Temp (a defect count shows as a percentage of the units inspected). Each inspection is a point, in the order inspected. Once a Quality Control Manager has set a chart's control limits from a period when the process ran as it should, the chart flags the points that show something has changed: signals. This is statistical process control (SPC), which food safety and quality standards such as SQF and BRCGS expect on the measures that matter. Nothing is typed in. Quality Control Managers set the limits; Users with the Control Charts permission see the charts and change nothing.

THE OVERVIEW

The overview lists each chart with points in the period (the last 30 days to start with) or control limits: its points, its limits, its signals with the latest one, and its latest value. Select a count to see only the charts Signalling, In control or with No control limits, or All; choose other dates and select Apply Filter. Select a chart's name to open it; a chart with 20 points or more and no limits offers Set them.



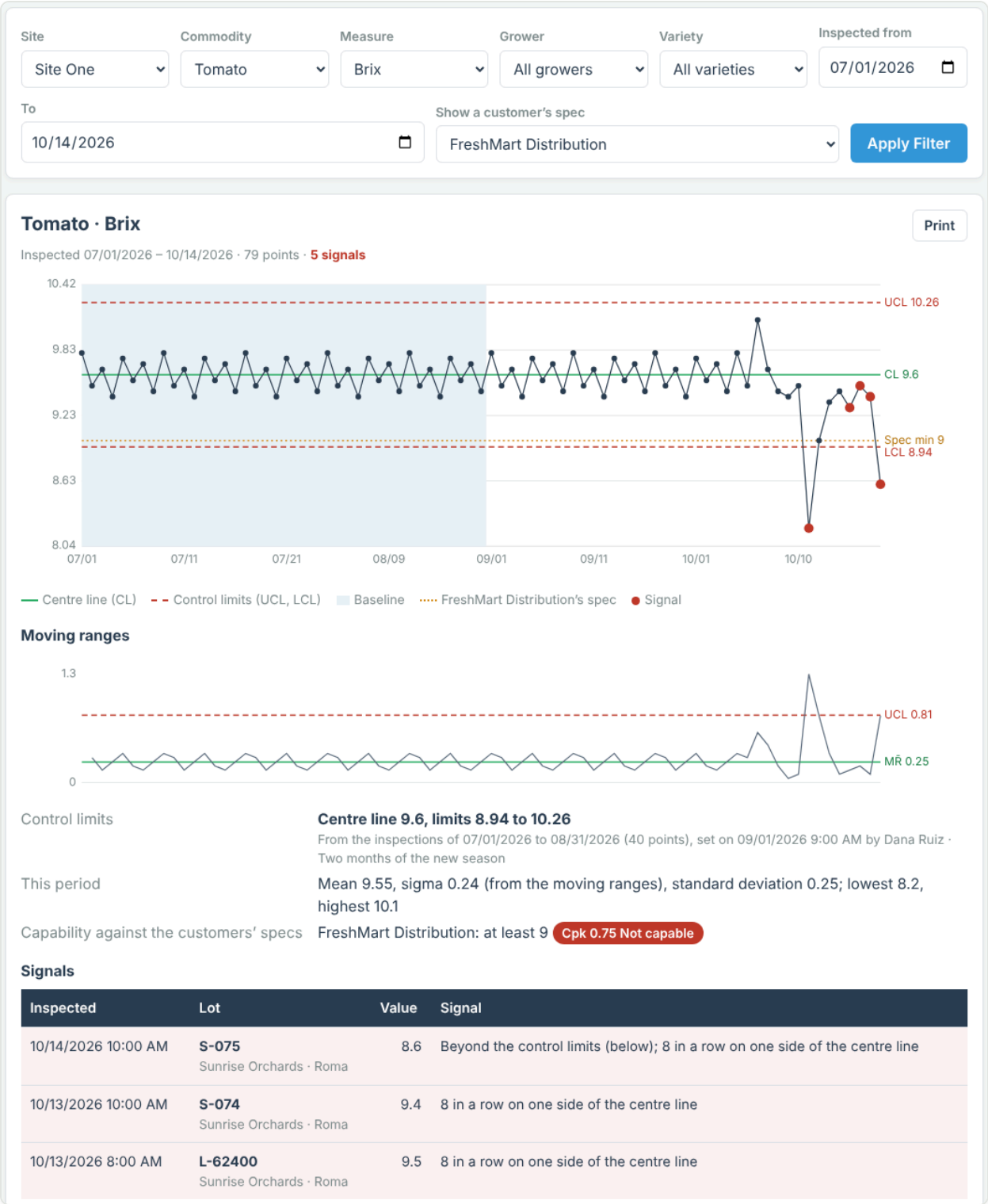
The control charts of a site

READING A CHART

A chart shows the last 90 days to start with; choose the Commodity and the Measure, a Grower or a Variety, and the dates, then select Apply Filter. Each dot is an inspection: hold the pointer on it to see its date, lot, grower and value. The green line is the centre line (CL) and the dashed red lines the control limits (UCL above, LCL below); the shaded band is the baseline period they were set from. The red dots are signals, of three kinds:

- A point beyond the control limits.
- 8 points in a row on one side of the centre line: the process has shifted.
- 6 points in a row each higher (or lower) than the one before: a trend.

A temperature measure is shown in the site’s unit, with °F or °C on every value: converted, when the question is answered in the other unit (its limits stay as they were set). Below the chart are the moving ranges, how much each point differs from the one before; then the limits in force, with their baseline, who set them and when; the period’s mean, sigma (from the moving ranges) and standard deviation; and the capability against each customer spec in force that sets a limit on the measure (see 6.24). Capability (Cpk) is how many times 3 sigma fit between the mean and the nearer spec limit: 1.33 or more is Capable, 1 to 1.33 Marginal, below 1 Not capable; it needs 20 points. Choose a customer under Show a customer’s spec to draw their limits on the chart (dotted orange). Then come the signals, newest first, Every point, and the Earlier control limits. Select Print to print the chart.



A control chart with its signals

SETTING THE CONTROL LIMITS

1. Open the chart and, under Set the control limits, choose the Baseline from and To dates: a period when the process ran as it should, with at least 20

inspections. All growers and varieties count.

2. Type a Note if you want, such as what the period was.
3. To set every measure of the commodity from the same period at once, tick Every measure of ... from the same period.
4. Select Set the control limits. The centre line is the baseline's mean, and the limits are the mean plus and minus 3 sigma, sigma being the average moving range divided by 1.128 (a percentage stays between 0 and 100). A measure without 20 points that vary in the baseline isn't set; the message says which.

- The limits stay as they are until they are set again, so a drift shows against them. After a real change in the process, set them again from a period after it.
- Withdraw these limits, saying why, puts the earlier limits back in force, if there are any.
- The signals look back 60 days before the period shown, so a run that started earlier still counts.
- On a percentage chart whose lower limit is 0, a lot with no defects counts on neither side of the centre line, so a run of clean lots isn't a signal.

> **Note:** The Settings (Quality Control Managers) say whether Trend Alerts reports the charts with a signal in the last 7 days (see 6.13). The History lists the control limits set and withdrawn, and the changes to the settings.

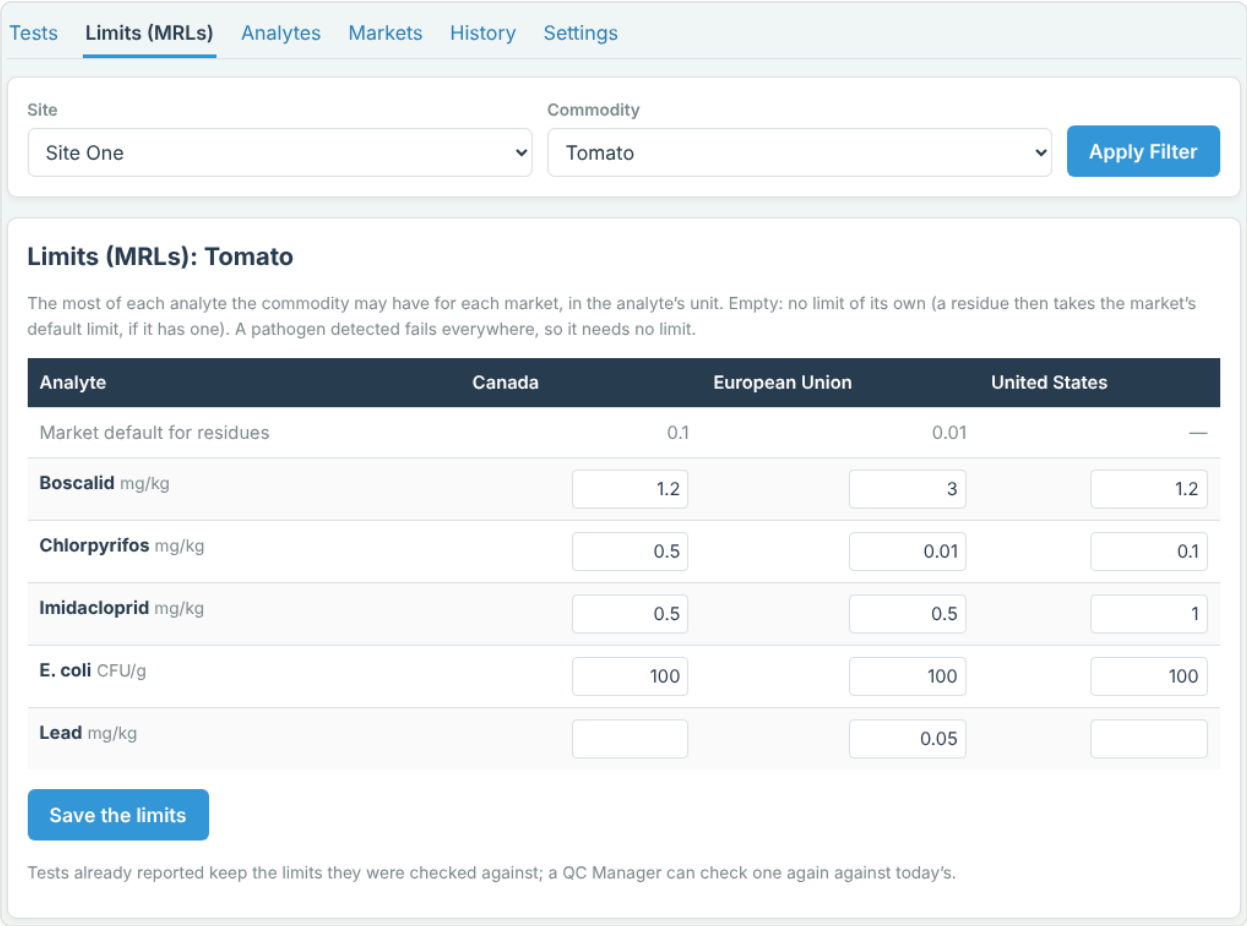
6.38 Lab Results

Lots > Lab Results keeps the samples sent to labs, of a lot or of a grower's product before harvest, for pesticide residues, microbiology (such as Salmonella or E. coli) or heavy metals, and their results. The results are typed in from the lab's report, with the report attached, and checked at once against the limits (maximum residue limits, MRLs) a Quality Control Manager keeps for each commodity, analyte and market the product goes to: the United States (the EPA's tolerances), Canada (Health Canada's MRLs), the European Union, or a customer with stricter limits. A test meets or fails each market. Nothing is blocked: a failed test is flagged on the page, on its lot, on Trend Alerts and on the QA Dashboard until non-conforming

product is logged from it or a Quality Control Manager says what was done. Quality Control Managers keep the analytes, markets and limits; Users with the Lab Results permission record tests and type in their results.

SETTING UP: MARKETS, ANALYTES AND LIMITS

1. On the Markets tab, add each market the product goes to. A market's Default limit for residues applies to a pesticide with no limit of its own for that market, such as the European Union's 0.01 mg/kg, or 0 for the United States, where a residue without an EPA tolerance is violative; leave it empty for none. Add the usual markets adds the United States (EPA tolerances, 40 CFR 180), with a default limit of 0, and Canada (Health Canada MRLs), with 0.1 mg/kg (Health Canada's general MRL of 0.1 ppm for a residue without a specific MRL, Food and Drug Regulations B.15.002), when the site doesn't have them; the site's own country (QA Setup, 6.32) comes first. Check the limits against Health Canada's MRL database.
2. On the Analytes tab, add what the labs test for: its Name (and its name in Spanish), its Kind (pesticide residues, microbiological, heavy metals or other) and its Result: a number in a Unit (mg/kg, CFU/g...) or, for a pathogen, detected or not.
3. On the Limits (MRLs) tab, choose the Commodity and type the most of each analyte it may have for each market, in the analyte's unit; leave a cell empty for no limit of its own. Select Save the limits.



The limits of a commodity

- A pathogen needs no limit: detected fails every market.
- An analyte or market that is no longer needed can be marked not in use; it stays on the tests that have it. An analyte's result type can't change once results were given for it, nor its unit once results or limits were given in it: add a new analyte instead.
- A test already reported keeps the limits it was checked against when the limits change. Check again against today's limits (Quality Control Managers) on a test checks it with the limits as they are now.

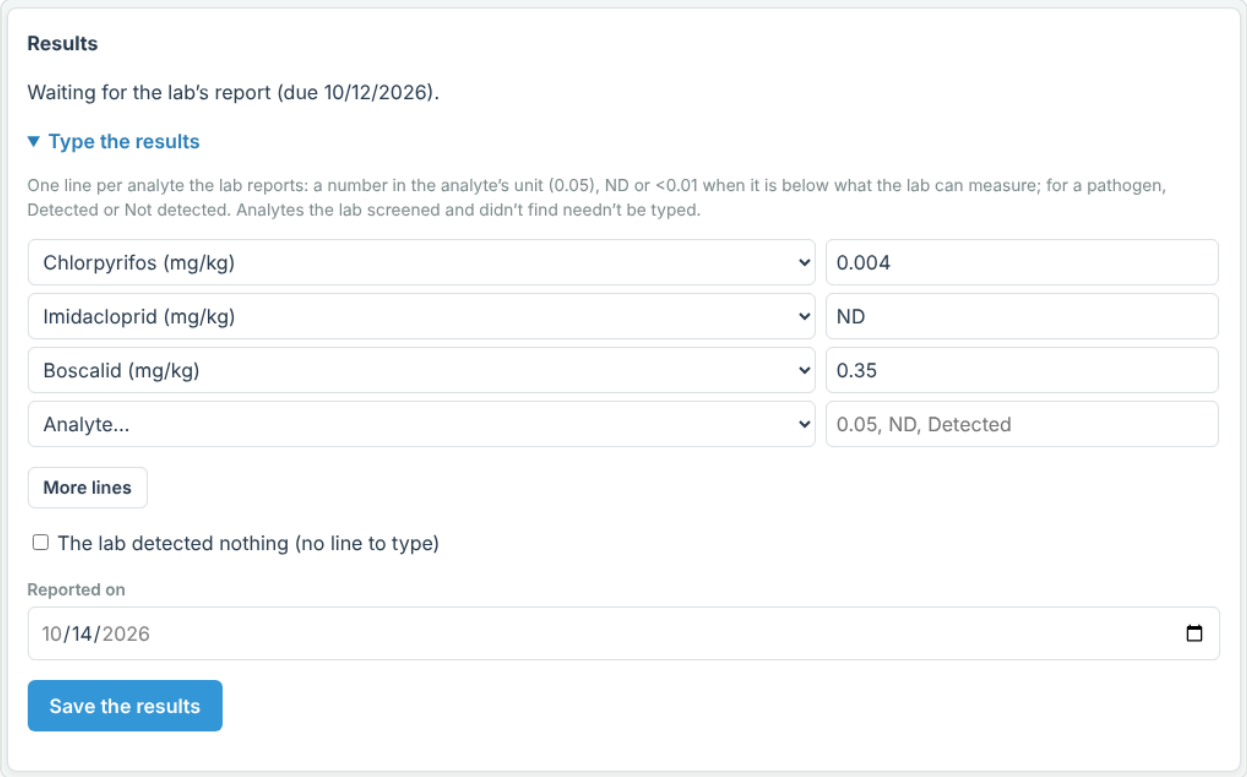
RECORDING A LAB TEST

1. Start from the lot: Record a lab test among its links on Edit Quality Inspections. Or go to Lots > Lab Results and select Record a lab test, then choose the Commodity, the Grower if any, and What was sampled (a field, a block).

2. Choose what it is Tested for, type the Lab (the labs used before are offered), the lab's sample or report number if you have it, and the day it was Sampled on (today, or up to a year ago).
3. Add the lab's chain of custody or report (PDFs or photos) if you have it, and select Record the test. The test gets its number, such as LT-12, and waits for its results.

TYPING THE RESULTS

1. Open the test. A test waiting for its results shows Type the results.
2. On each line, choose the Analyte and type the Result as the lab reports it: a number in the analyte's unit (0.05, or 0,05); ND, <LOQ or <0.01 when it is below what the lab can measure; for a pathogen, Detected or Not detected. Analytes the lab screened and didn't find needn't be typed; More lines adds lines.
3. If the lab's report finds nothing at all, tick The lab detected nothing instead.
4. Check Reported on (from the day sampled to today) and select Save the results.



Typing the results of a lab test

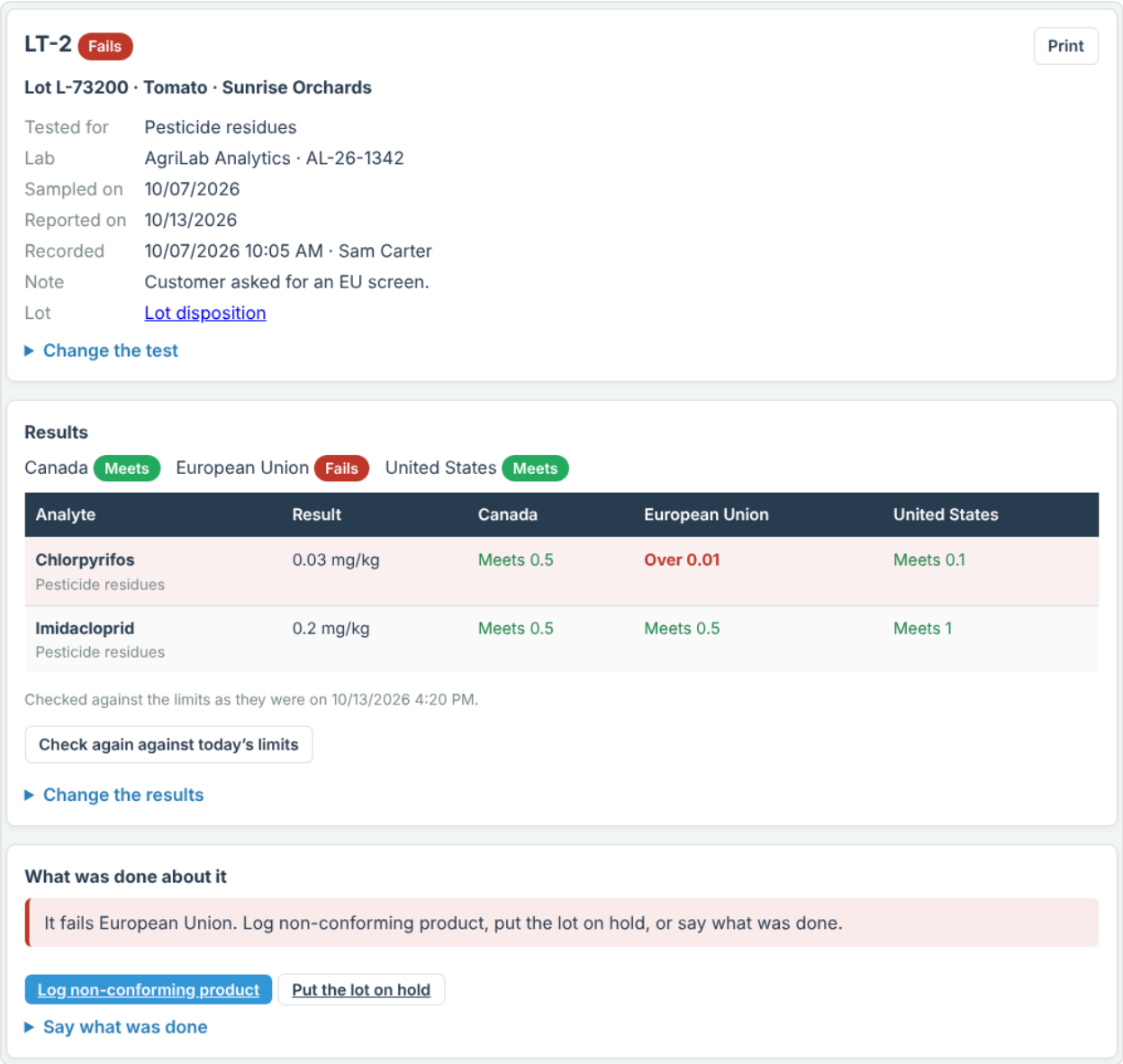
Each result is checked at once against each market in use: over its limit, or a pathogen detected, fails that market; a pesticide residue found for which a market has neither an MRL nor a default limit can't be judged for that market; any other result with no limit for any market isn't checked. The test then Meets the limits, Fails (with the markets it fails), is No limit: check it (with the markets it can't be judged for), or has No limits to check. Add the lab's report under The lab's report and files. Whoever recorded a test, or a Quality Control Manager, can change it and its files, and type its results; once the results are in, only a Quality Control Manager changes them.

A FAILED TEST

A failed test shows each result against each market's limit, the over-limit ones in red, and what to do about it:

- Log non-conforming product: opens Non-Conforming Product with the lot, what failed and the limits filled in (see 6.35). Logging it deals with the test; if the record is voided later, the test is flagged again.
- Put the lot on hold: opens Lot Disposition on the lot (see 6.7).
- Say what was done (Quality Control Managers): the lot not sent to that market, retested, the grower told... This also deals with the test.
- Start a recall (Quality Control Managers): when the lot has already gone to customers, starts a recall with the lot and what failed (see 6.39).

> **Note:** A residue with no limit: when a lab finds a pesticide residue for which a market has neither an MRL for the commodity nor a default limit, the test is No limit: check it, and Found, no limit: check it shows under that market. It isn't counted as passing: in the United States a residue without an EPA tolerance is violative, and in Canada Health Canada's MRLs apply. Add the limit on the Limits (MRLs) tab, or the market's default limit, and select Check again against today's limits, or Say what was done (Quality Control Managers). Until then it is listed to deal with, flagged on its lot and reported on Trend Alerts with the failed tests.



A failed lab test

THE TESTS

The Tests tab shows to start with the tests to deal with: those waiting for results (overdue after the days set), and those failed and not dealt with, whenever sampled. Select a count to see only those Waiting for results, Results overdue or Failed or no limit, not dealt with; or those Reported in the period, of them failed, Voided, or All, for the dates chosen. Search by lot, lab, sample, the lab's number or LT number. A Quality Control Manager can Void a test recorded by mistake, saying why.

Tests | Limits (MRLs) | Analytes | Markets | History | Settings

Record a lab test

Site: Site One | From: 09/15/2026 | To: 10/14/2026 | Lot, lab, sample or LT number | Apply Filter

To deal with: 3 | Waiting for results: 2 | Results overdue: 1 | Failed or no limit, not dealt with: 1 | Reported in the period: 6

Of them, failed: 3 | Voided: 1 | All: 9

Print

Reported (or sampled) 09/15/2026 – 10/14/2026

Test	Sampled	Lab	Reported	Status
LT-9 Lot L-38000 · Apples · Valle Verde Farms	10/03/2026 Heavy metals or other	Pacific Residue Lab	10/08/2026	No limits to check
LT-8 Lot L-30800 · Apples · Valle Verde Farms	10/07/2026 Pesticide residues	AgriLab Analytics AL-26-1338	10/12/2026	Meets the limits
LT-7 Lot L-20000 · Apples · Valle Verde Farms	10/13/2026 Pesticide residues	AgriLab Analytics	—	Voided
LT-6 Lot S-075 · Tomato · Sunrise Orchards	10/14/2026 Microbiological	Micro Labs Inc.	—	Waiting for results
LT-5 Lot S-062 · Tomato · Sunrise Orchards	10/02/2026 Pesticide residues	AgriLab Analytics AL-26-1301	—	Results overdue
LT-4 Lot S-066 · Tomato · Sunrise Orchards	10/06/2026 Microbiological	Micro Labs Inc. ML-5521	10/09/2026	Failed, dealt with Canada, European Union, United States
LT-3 Tomato · Desert Bloom Growers · Block 7, pre-harvest	09/28/2026 Pesticide residues	Pacific Residue Lab	10/05/2026	Failed, dealt with Canada, European Union
LT-2 Lot L-73200 · Tomato · Sunrise Orchards	10/07/2026 Pesticide residues	AgriLab Analytics AL-26-1342	10/13/2026	Fails European Union
LT-1 Lot S-060 · Tomato · Sunrise Orchards	09/21/2026 Pesticide residues	AgriLab Analytics AL-26-1180	09/29/2026	Meets the limits

The lab tests of a site

Note: The Settings (Quality Control Managers) say how many days after sampling the results are due (10 to start with), and whether Trend Alerts reports the failed tests not dealt with and the results overdue (see 6.13). The History lists the tests recorded, their results, the checks against today's limits, what was done, the tests voided, and the changes to analytes, markets, limits and settings.

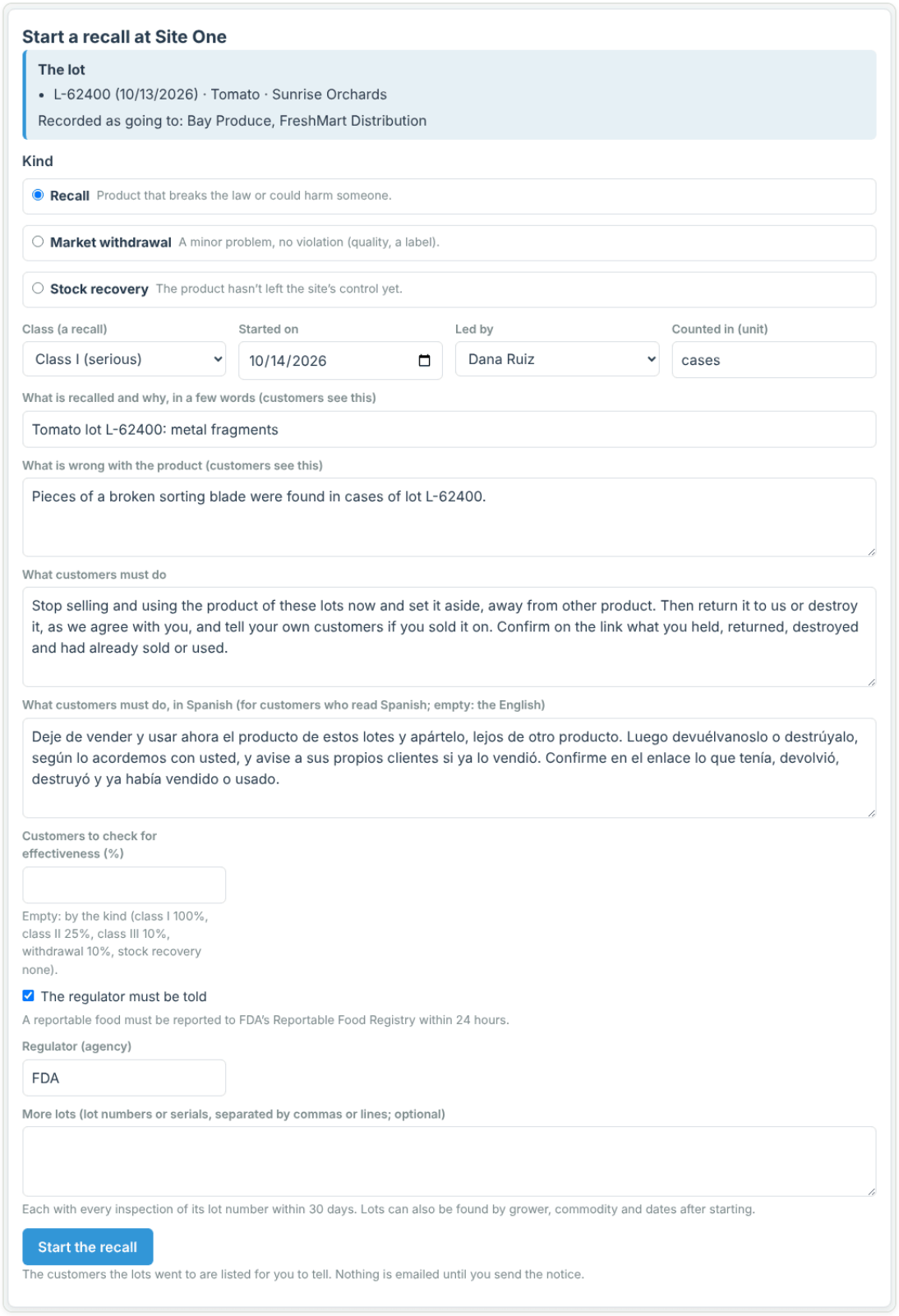
6.39 Recalls

Problems > Recalls runs a real recall from start to close: product of lots that must come back from the customers, or be stopped where it is. Continuum QC lists the lots affected and the customers they went to, emails each customer the notice with a link on which they confirm what they still hold, returned, destroyed and had already sold on, and keeps the checklist: every customer told and confirmed, nothing still set aside at customers, the product still at the site dealt with, the regulator told when needed, and the effectiveness checks done. A Quality Control Manager closes the recall when the checklist is done. Quality Control Managers start and change recalls; the recall team, the Users with the Recalls permission, tells the customers and records their answers and the checks. For an exercise, use Mock Recalls (6.28).

Kind	Use it when
Recall	The product breaks the law or could harm someone. Choose its class: Class I, the most serious (it could cause serious harm), Class II or Class III. At a site in Canada the classes are the CFIA's: Class 1 (high risk), Class 2 or Class 3, also in the customers' notice.
Market withdrawal	A minor problem with no violation, such as the wrong pack date on a label.
Stock recovery	The product hasn't left the site's control yet.

STARTING A RECALL

1. Start from where the problem was found: Start a recall among a lot's links on Edit Quality Inspections or in the Lot Disposition window, on a customer claim (6.10), on a non-conforming product record (6.35), on a failed lab test (6.38) or on a food-contact positive swab (6.40). Or go to Problems > Recalls and select Start a recall.
2. Choose the Kind (and the class of a recall), and write what is recalled and why in a few words, and What is wrong with the product. Customers see both: started from a claim, a record or a test, the title begins as the lot and commodity only, and what is wrong as a draft to check.
3. Check What customers must do, in English and in Spanish for customers who read Spanish: a text to stop selling, set the product aside and return or destroy it is filled in to start with.
4. Check the day it Started on, who it is Led by and what it is Counted in (cases, cartons…). Check The regulator must be told and the agency: they start as the site's country has them (in Canada ticked for every recall, with the CFIA, which must be told immediately of a food that may be a risk to health; in the United States ticked for a Class I recall, with the FDA: a reportable food must be reported to FDA's Reportable Food Registry within 24 hours), and follow the kind and class chosen until you change them; and change the share of Customers to check for effectiveness if needed (empty: by the kind: Class I 100%, Class II 25%, Class III 10%, not classified 25%, a withdrawal 10%, a stock recovery none).
5. Type More lots if other lots are affected, and select Start the recall. It gets its number, such as RC-6.



Starting a recall from a lot

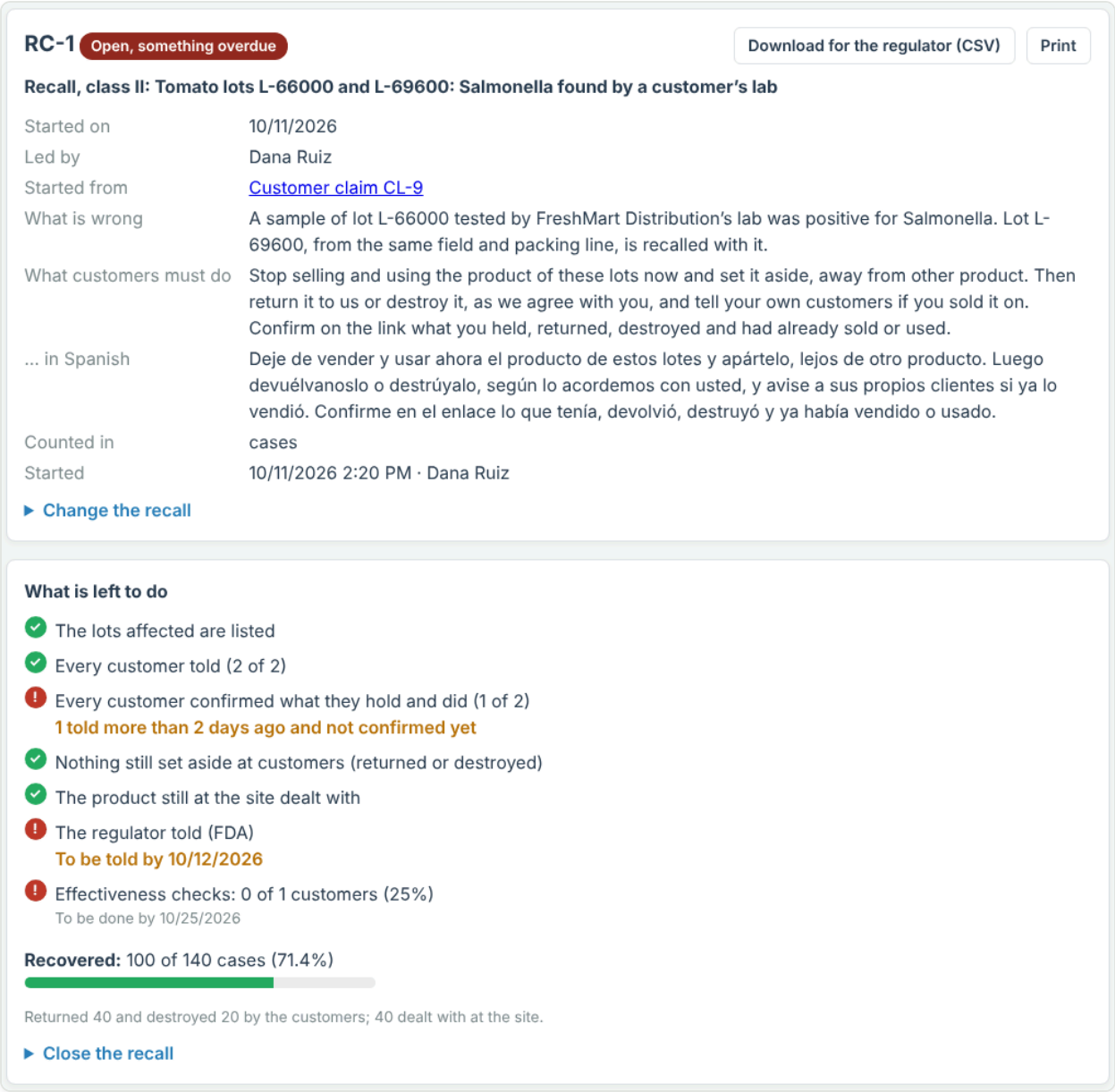
A lot brings every inspection of its lot number within 30 days, as a mock recall traces it, and the customers they were recorded as going to on Customer

Specifications (6.24), with the email addresses and language kept for their quality certificates (6.25). Nothing is emailed until the notice is sent. The same title sent twice at once starts one recall.

> **Note:** A recall started with the regulator still to tell emails the site's Quality Control Managers at once, in their language (RC-6: tell the regulator (CFIA) immediately), and the history says so. The days to tell the regulator are in the Settings: 1 to start with in the United States, 0 in Canada (the same day: the recall shows To be told immediately).

THE RECALL PAGE

A recall opens with what it is, then What is left to do: each item of the checklist done (in green) or not (in red), with what is late and the days things are due, and what was Recovered: what customers returned and destroyed and what was dealt with at the site, against what was shipped to them and what was at the site. Type what was shipped to each customer (Work on it, Change the customer): customers without it are left out of the share.



A recall and what is left to do

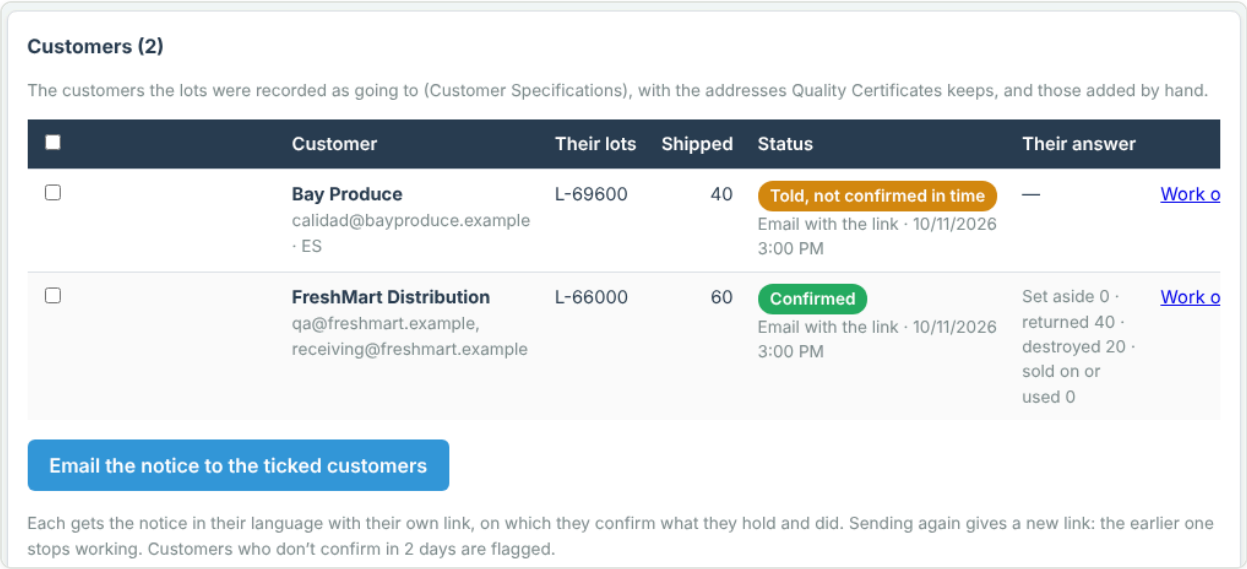
- Lots: the lots with how much of each was packed or shipped (optional; Save the quantities). Quality Control Managers add lots under Add lots by lot number (with every inspection of the same lot number, or not) or Find lots by grower, commodity and dates, ticking those to add; take out puts a lot out of the recall, saying why. Its customers stay: take them out on their own.
- The product still at the site: how much there was when the recall started, how much was dealt with (held, reworked or destroyed) and how.
- The regulator (Quality Control Managers): whether it must be told, the agency, the day it was told, its reference and a note.

- Download for the regulator (CSV), beside Print: the recall's lots and the customers they went to, as one file to send to the regulator within 24 hours (Trace RC-6 2026-10-14.csv), one row per step as for a mock recall (6.28): each lot as Received, each customer as Shipped to with what was shipped and their answer (also every shipment of the lots recorded on Customer Specifications for a customer taken out of the recall, or after the lots were added, the Reference saying which), and what was At the site. When a lot's number is also its traceability lot code, the file also has a row for each Shipping, Receiving and Transformation event of the lot, and of the lots made from it, on Traceability Events (see 6.61), at the site and the company's other sites you have: the event, the lot code, the quantity, the date, the site, who it was shipped to, and as the Reference the event's number (Traceability event T-00047). Each download is recorded in the history.
- Files: the regulator's letter, destruction records, photos.

TELLING THE CUSTOMERS

Customers lists each customer with their email addresses, their lots, what was shipped to them, whether they were told and how, and their answer. To tell them by email:

1. Tick the customers to tell (those not told yet are ticked to start with).
2. Select Email the notice to the ticked customers.

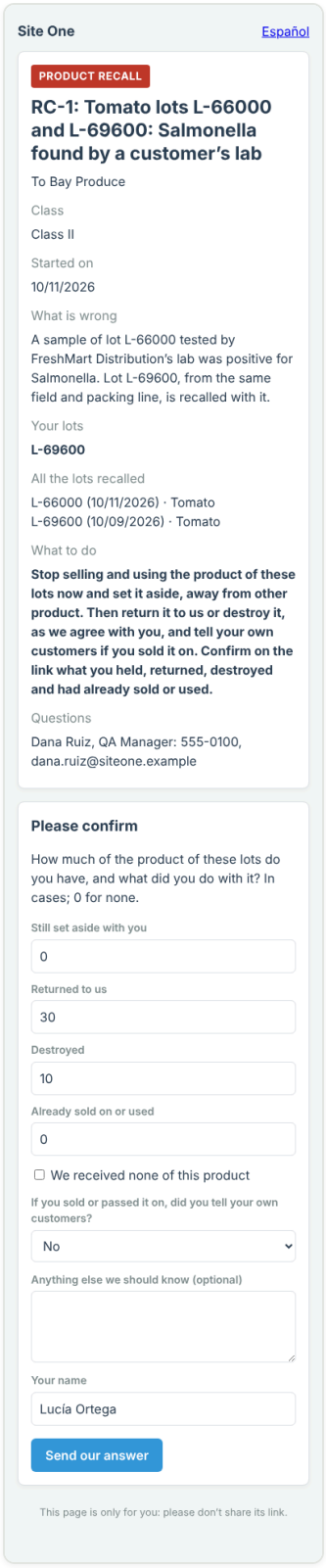


The customers of a recall

Each gets the notice in their language, from the site’s email account, with their own link. Sending it again to a customer gives a new link, and the old one stops working. A customer without an email address can’t be ticked: select Work on it under the customer and record that they were told by phone or in person, who and when; then, when they answer, Type in their answer. Quality Control Managers also change the customer there, or take them out (they didn’t get the lots), saying why, and Add a customer by hand, from the site’s customers or any name. Changing a customer’s email addresses stops the link already sent, since it may have gone to a wrong address: send them the notice again.

THE CUSTOMER’S PAGE

The link opens a page that needs no sign-in, in the customer’s language with a switch to the other: the notice (what is wrong, their lots, every lot recalled with its date and commodity, what to do and who to ask), then their answer: how much they still hold set aside, returned, destroyed and had already sold on or used (or that they received none), whether they told their own customers, a note and their name. They can change it while the recall is open. The recall team sees the answer at once, marked on their link.



The page a customer confirms on, on a phone

> **Note:** The link is only for that customer: it stops working when the customer is sent a new one, is taken out of the recall, or the recall is closed or cancelled. Set Who customers contact with questions in the Settings: it is shown on the notice. If Continuum QC is reached in the office by another name than customers can open (a server name, or an address without https), set The address customers' links start with there too, such as https://qc.yourcompany.com.

EFFECTIVENESS CHECKS

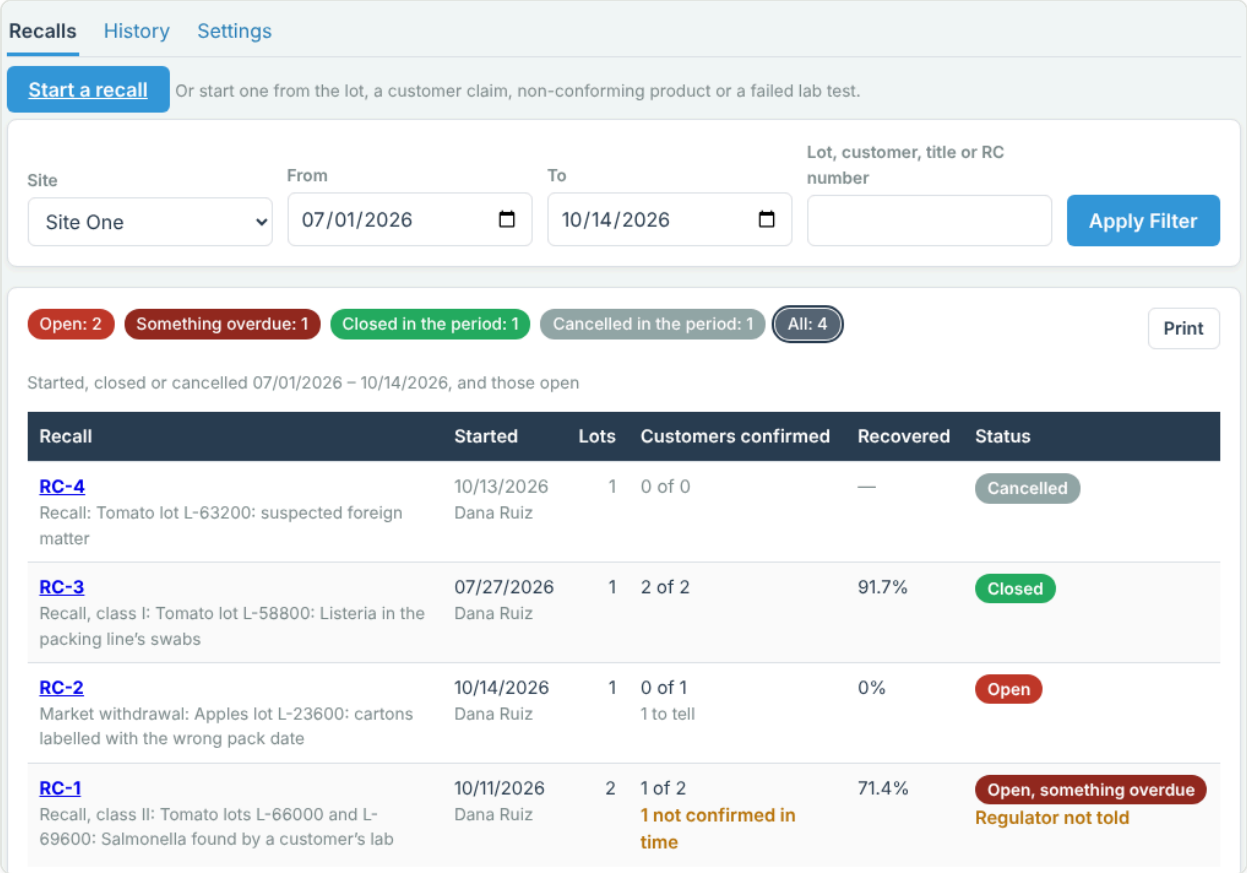
Under Effectiveness checks, Record an effectiveness check for a customer called, visited or emailed to see they got the notice and acted on it: the day, how, the result (Effective, or Not effective: tell them again) and what was found. The checklist counts the customers whose newest check was effective against the share set. Take back removes one recorded by mistake.

CLOSING A RECALL

When everything on the checklist is done, a Quality Control Manager selects Close the recall, writes how it ended (what was recovered, what the checks found) and closes it. If something isn't done, the recall closes only with Close it anyway ticked, saying why in the note; it is then marked closed with something not done. Cancel (started by mistake), with the reason, cancels it. Once closed or cancelled, the customers' links stop working and nothing more can be changed.

THE RECALLS

Problems > Recalls shows to start with the open recalls, whenever started, with their lots, the customers confirmed, the share recovered and what is overdue. Select a count to see only those with Something overdue, those Closed in the period or Cancelled in the period, or All, for the dates chosen; search by lot, customer, title or RC number.



The open recalls of a site

> **Note:** The Settings (Quality Control Managers) say how many days customers have to confirm after being told (2 to start with), how many days after the start the regulator must be told (1) and the checks done (14), who customers contact with questions, the address customers' links start with, and whether Trend Alerts reports what is overdue (see 6.13). The History lists everything done, including what customers answered on their links.

6.40 Environmental Monitoring

Packing house > Environmental Monitoring runs the site's environmental monitoring program: swabs of the packing house's surfaces, tested for Listeria, Salmonella or ATP, to find contamination before it reaches the product. The swab points are kept by zone and placed on a floor plan; a schedule says how many points of each zone get each test, and how often, and Continuum QC picks them

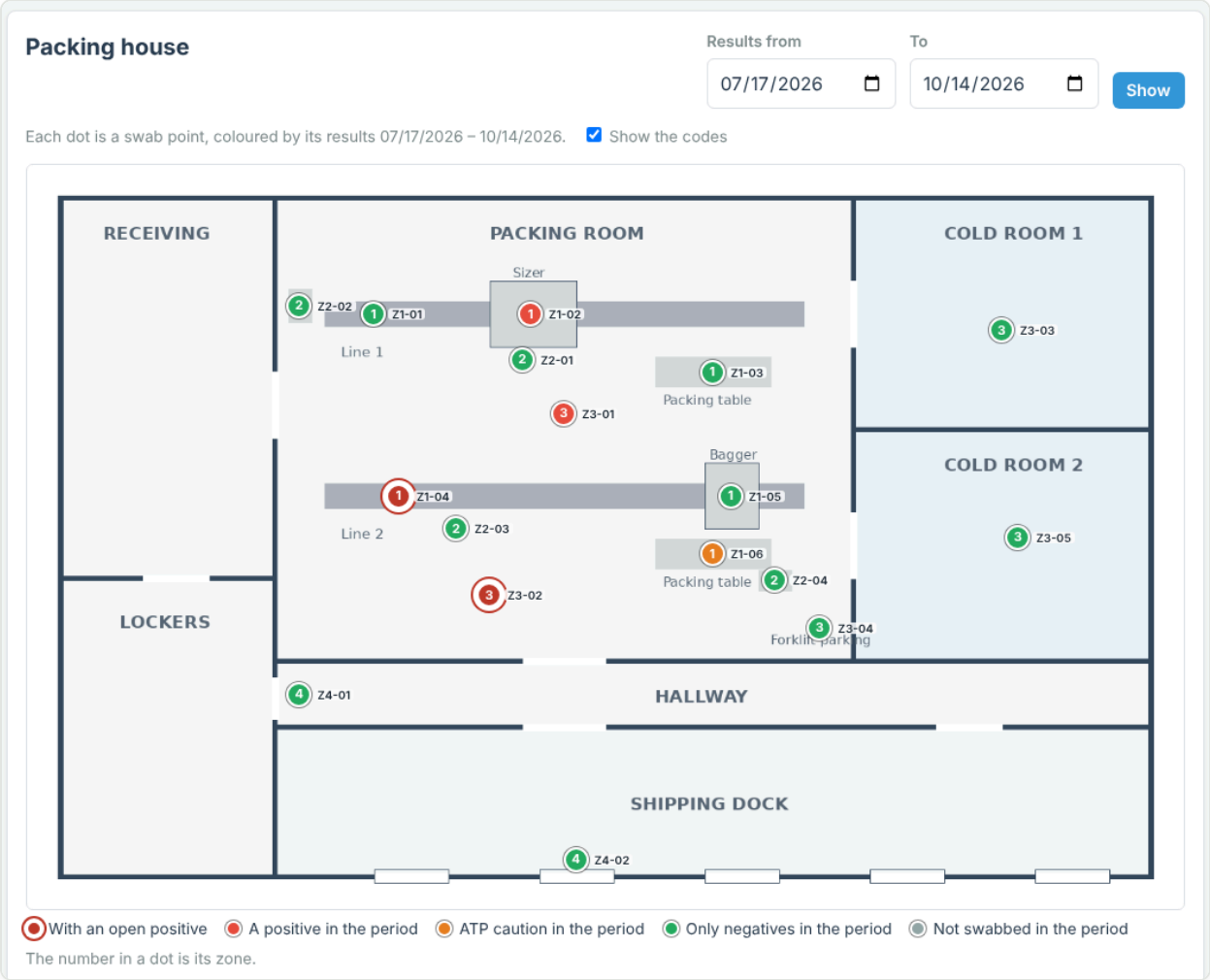
at random so every point gets its turn, keeping the swabs missed. A positive result opens a positive, followed until the point is clear: it is cleaned and swabbed again, with the points around it, until 3 negatives in a row, and a positive on a food-contact surface flags the lots packed since the point's last negative swab. Quality Control Managers set up the points, the floor plans, the schedule and the settings, and close positives; Users with the Environmental Monitoring permission take the swabs and record their results.

Zone	What it is
Zone 1: food contact	What the product touches: belts, bins, sizers, knives, packing tables. A pathogen found here flags the lots packed on it.
Zone 2: next to food contact	Next to it: equipment frames, control panels, the outside of tables.
Zone 3: further away in the room	In the room but further away: floors, drains, walls, forklifts, carts.
Zone 4: outside the room	Outside the packing room: hallways, locker rooms, the loading dock, cold-room doors.

SETTING UP THE SWAB POINTS

Quality Control Managers set up the points under Swab points:

1. Under Floor plans, type the New floor plan's name (Packing house, Cold room 2…), choose its picture, a PNG or JPEG drawing, scan or photo (a PDF can be saved as a picture first), and select Add the floor plan. A site can have more than one.
2. Under Add a swab point, choose the Zone, and type the Code, short, shown on the plan and the lists (the next free one, such as Z1-07, is filled in), the Area (the line or room) and What is swabbed (the surface, the piece of equipment). Tick the Tests it gets (a zone 1 point gets Listeria spp. and ATP to start with, the others Listeria spp.), and select Add the point.
3. Place it on the plan: click where the point is, then select Save the place. Later, move puts it somewhere else, and Take it off the plan removes it from the plan.



The swab points on the floor plan

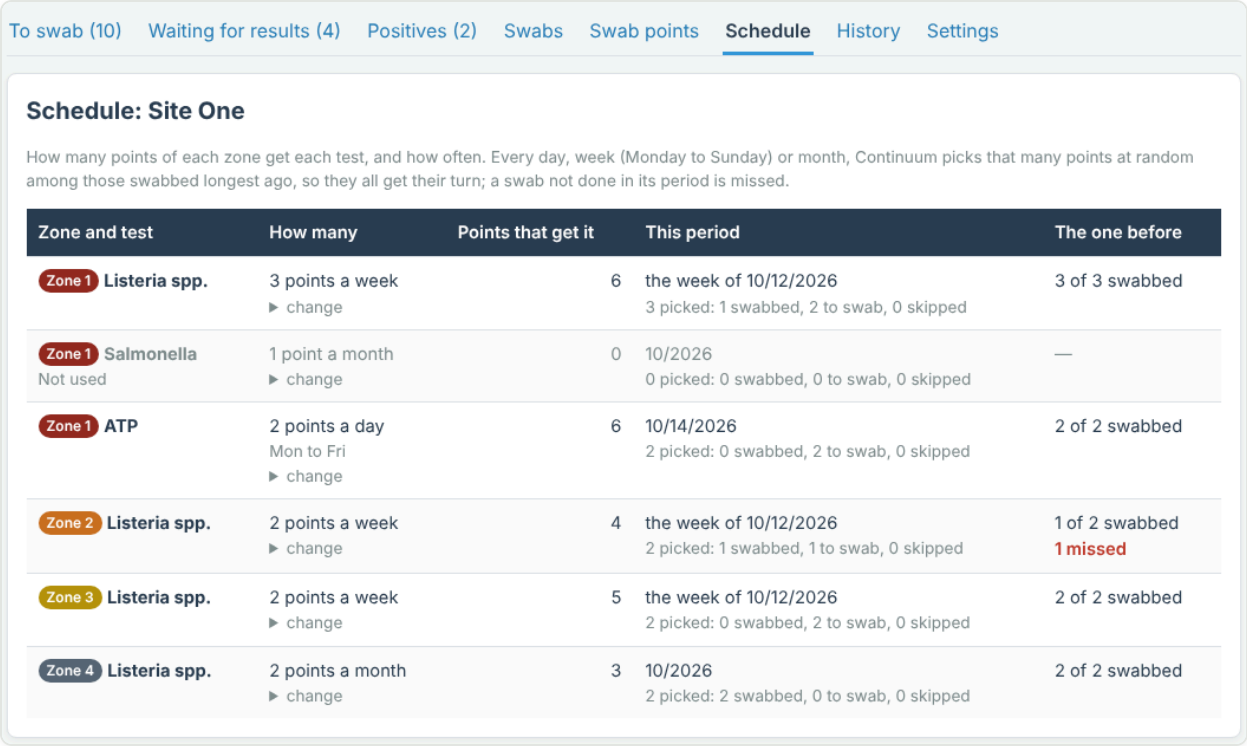
The floor plan shows each point as a dot with its zone number, coloured by its results in the dates chosen: with an open positive, a positive in the period, an ATP caution in the period, only negatives, or not swabbed. Point at a dot to see its last results; select it to go to the point in the list. Show the codes writes each point's code by its dot. The list under the plan has each point with its tests, last results and swabs in the period: change changes it, and stop using takes it off the schedule (its routine swabs still to do are taken off), until use it again. The points not on a plan are named above the list.

THE SCHEDULE

Under Schedule, Quality Control Managers say how many points of each zone get each test, and how often: every day, week (Monday to Sunday) or month. Each period, Continuum QC picks that many points at random among the zone's points

that get the test, those swabbed longest ago first, so they all get their turn. A point under an open positive for the test isn't picked. A routine swab not recorded in its period is missed.

1. For a site with no schedule, select Start from the usual schedule: Listeria spp. on 5 zone 1 points a week, 5 zone 2 points a week, 3 zone 3 points a week and 2 zone 4 points a month, and ATP on 3 zone 1 points a day, Monday to Friday. Change it to suit the site.
2. Or, under Add to the schedule, choose the zone and the test, How many and How often (for daily swabs, tick the days they are taken), and select Add.



A site's swabbing schedule

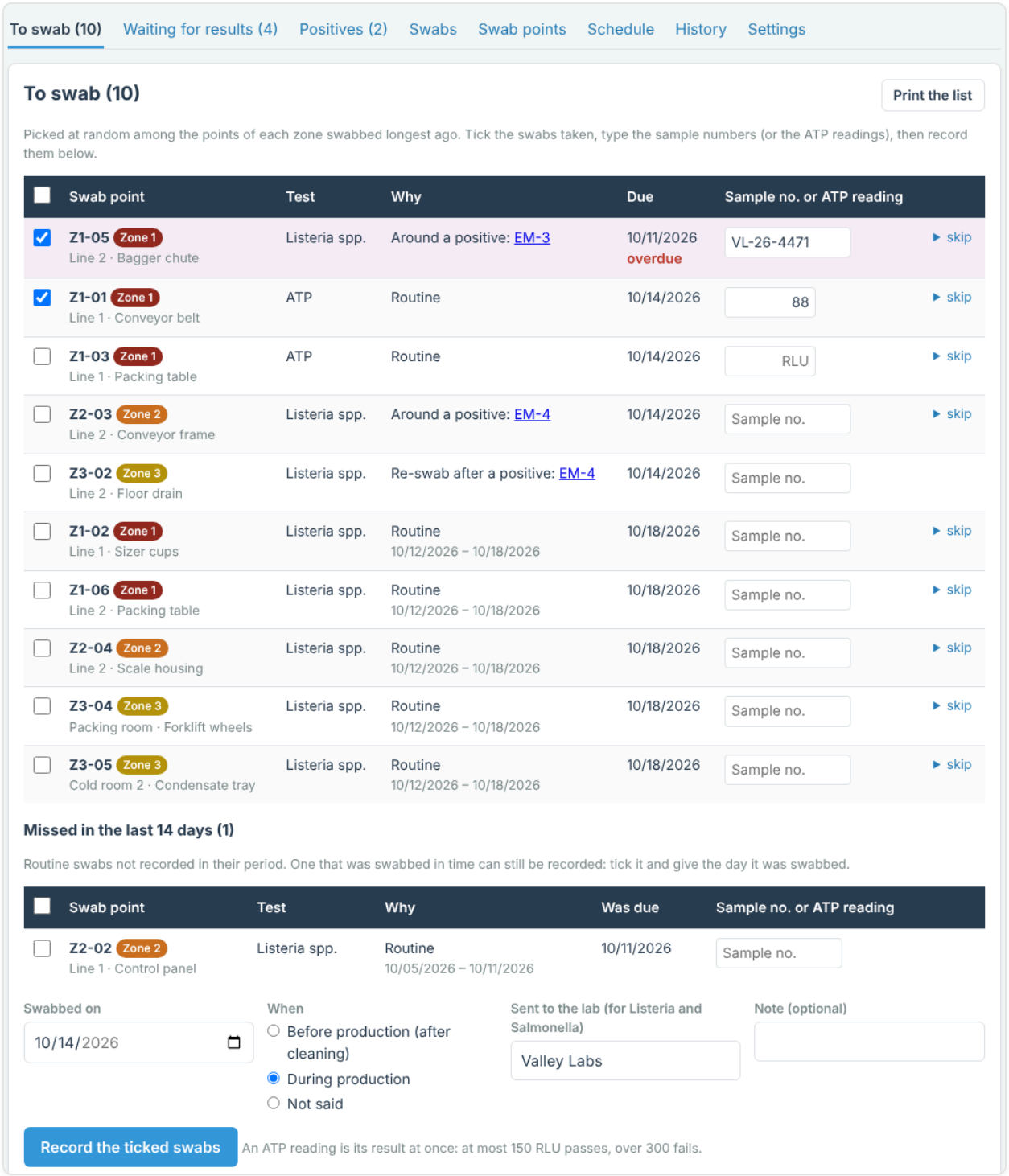
Each line shows the points that get it, what was picked this period (swabbed, to swab, skipped) and in the period before, with those missed. Change one to change how many, how often, or whether it is In use; asking for fewer takes off the newest swabs still to do this period.

TAKING THE SWABS

To swab, where the page opens, lists the swabs to take: the routine swabs picked for the period, and the swabs after a positive, those overdue first. Print the list to

take it along.

1. Tick the swabs that were taken. For Listeria and Salmonella, type the lab’s Sample no. (optional); for ATP, type the ATP reading (RLU). Typing one ticks the swab.
2. Under the list, check the day they were Swabbed on, When (before production, after cleaning, or during production) and the lab they were Sent to, and add a note if needed.
3. Select Record the ticked swabs.



The swabs to take today

- An ATP reading is its result at once: at most 150 RLU passes, over 300 fails, and in between is a caution.
- A swab sent to a lab waits for its result (see Results, below).

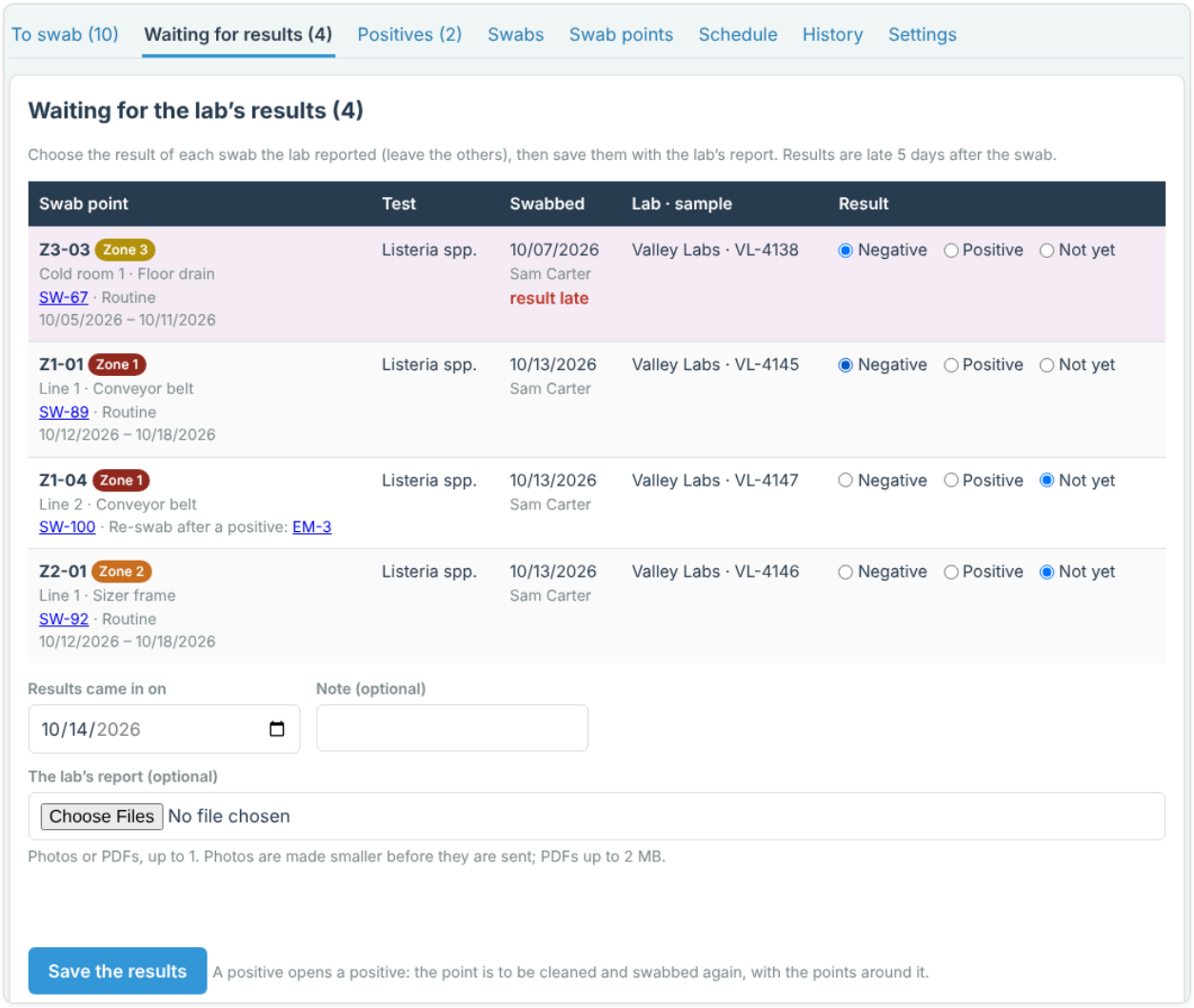
- skip a routine swab that can’t be taken, saying why (line not running…): another point is picked instead, if there is one. A swab after a positive can’t be skipped.
- Record an extra swab (a point not picked) records a swab of any point, such as after a repair.

> **Note:** Missed in the last 14 days lists the routine swabs not recorded in their period. One that was swabbed in time can still be recorded: tick it and give the day it was swabbed.

RESULTS

Waiting for results lists the swabs sent to a lab, oldest first; a result is late 5 days after the swab. When the lab reports:

1. Choose the result of each swab the lab reported, Negative or Positive, and leave the others at Not yet.
2. Check the day the Results came in on, add the lab’s report if you want (a PDF or a photo), and select Save the results.



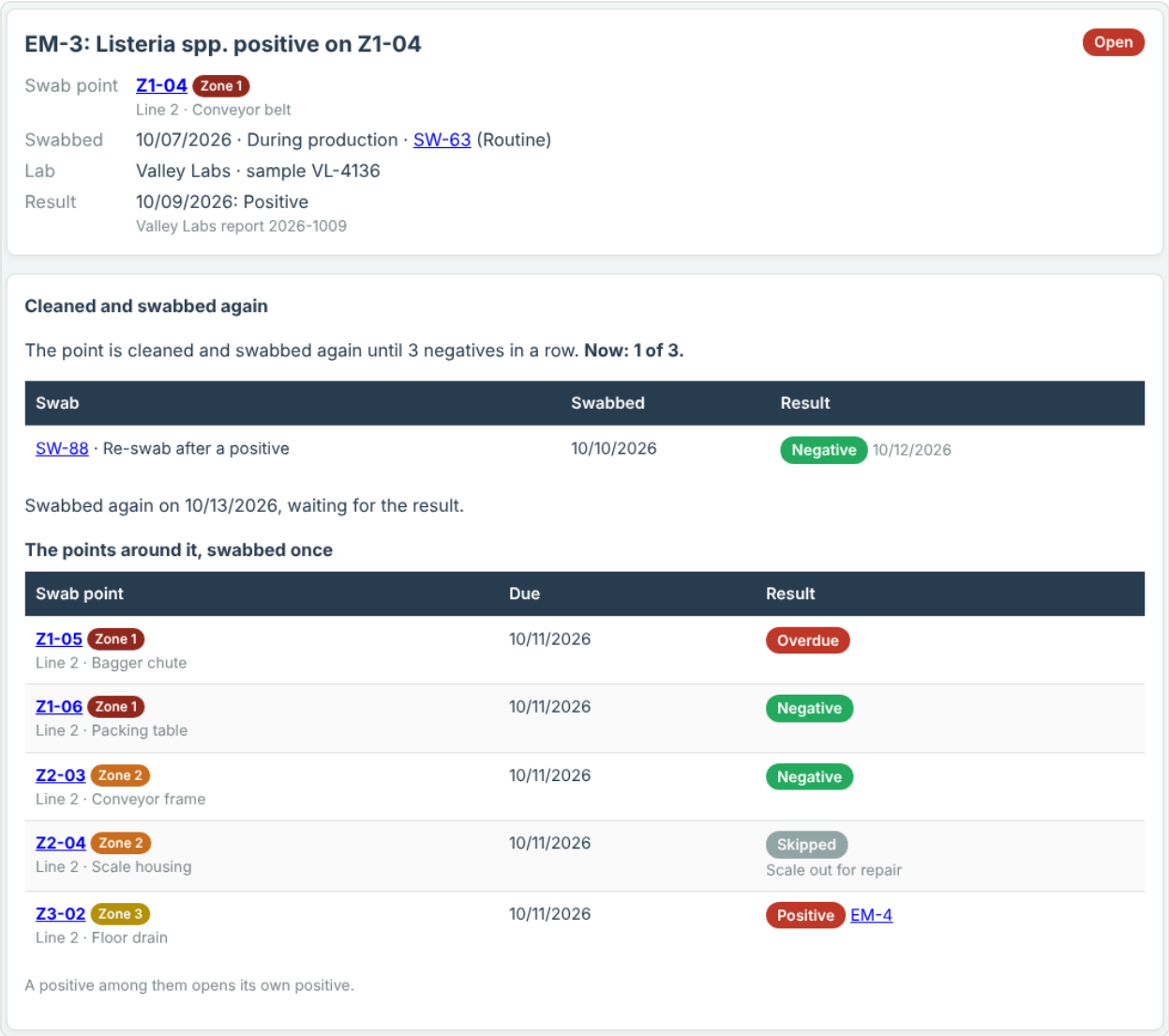
Typing in the lab's results

A positive result, or a failed ATP reading, opens a positive (see below). Swabs lists every swab of the dates chosen, by zone, test, result or point: select one to open it. Take it back removes a swab recorded by mistake while it waits for its result (an extra swab is removed; a routine one is to swab again), and Correct the result (Quality Control Managers) changes its result, saying why. A result that opened a positive can be made negative only once the positive is voided.

POSITIVES

Positives lists the open positives, whenever found, with the swabs after them and the lots flagged; select a count to see those Closed in the period, Voided or All. Open a positive, such as EM-3, to follow it:

- Cleaned and swabbed again: the point is cleaned and swabbed again within 2 days, until 3 negatives in a row (for an ATP fail, the same day, until a reading passes). Each re-swab is on the To swab list; a positive among them starts the count again.
- The points around it, swabbed once (not for an ATP fail): the points near it on the floor plan (within 15% of the plan's size), then those of its area, at most 6. A positive among them opens its own positive.
- Lots packed while it was positive: for a Listeria or Salmonella positive on a zone 1 point, the lots inspected from the day of the point's last negative swab (what was packed after that swab isn't shown clean; at most 14 days back) to the day of the result. They show a warning on Edit Quality Inspections and on Lot Disposition until What was done with the product is recorded. Hold opens a lot on Lot Disposition to put it on hold (change, for one already on hold); Start a recall starts a recall of the lots (see 6.39); and Flag the lots inspected since adds the lots packed after, while the positive is open: they are flagged until what was done with the product is saved again to cover them too.
- Cause and what was done: what caused it and what was done (cleaning, repairs, training...). Raise a corrective action starts one from the positive (see 6.9).
- Photos and papers: the lab's reports, the cleaning record.



A positive, its re-swabs and the points around it

When the point is clear, the positive shows Open, clear: a Quality Control Manager selects Close the positive, once the cause is recorded and, with lots flagged, what was done with the product. One not clear yet closes only with Close it anyway (the point was removed or replaced...) ticked and a note. Void it (opened by mistake), with the reason, for a wrong result: its swabs still to do are no longer needed and its lots are no longer flagged.

> **Note:** The Settings (Quality Control Managers) say the ATP readings that pass and fail (150 and 300 RLU to start with), the days a lab's result is late after (5), the days to swab again after a positive (2), the negatives in a row that clear one (3), how near the points around a positive are (15% of the plan), how many days back lots are flagged at most (14), whether swabbing is paused (no production, out of season: no routine swabs are picked), and whether Trend Alerts reports the open positives and the swabs missed or late (see 6.13). The History lists everything done, including the swabs Continuum QC picked and marked missed.

IN THE FOOD SAFETY APP

Swabs can also be recorded in the Food Safety app (see 6.71). Its Environmental swabs lists each swab point, under its zone, with the tests the point gets: swabbed or not (with why not) and the lab's sample number, or the ATP reading; when (before or during production) and the lab. Each test swabbed records the point's swab to take (a re-swab or a swab around a positive first, then the routine swab of the period), or else an extra swab, on the day of the run (up to 30 days back); an ATP reading is its result at once. A test answered not swabbed skips the routine swab to take, with why. The lab's results are typed in here, as usual.

In the add and change forms of a swab point, Location in the Food Safety app and Area in the Food Safety app say where the app lists it instead of under its zone (see 6.72).

6.41 Sanitation

Packing house > Sanitation runs the site's sanitation program: the master sanitation schedule, which says what is cleaned in each area, how, with what and how often, and the pre-op check of each area before production starts. The sanitation crew records the cleaning done, and QC verifies it: someone other than who did it. Before production, each area's checklist is checked item by item; what fails is cleaned again and checked again, and the area is released for production only when every item passes.

Who	What they do
Everyone with the Sanitation permission (the sanitation crew)	Record the cleaning done, and see the pre-op checks, the records and the schedule.
Quality Control Managers, and the Users chosen in the Settings	Do the pre-op checks, verify the cleaning or send it back, skip cleaning that can’t be done, and mark an area with no production.
Quality Control Managers	Keep the areas and their checklists, the master schedule and the settings, and release an area anyway.

AREAS AND CHECKLISTS

Quality Control Managers set up the areas under Areas and checklists:

1. Under Add an area, type the Name (Line 1, Cold room 2, Receiving…) and a Description if you want, and select Add the area.
2. For its checklist, select Start from the usual checklist: eight items (food-contact surfaces clean, an ATP reading of a food-contact surface, no standing water or chemical left on the equipment, guards and parts back in place, floors and drains clean, no condensation over product or packaging, no sign of pests, cleaning tools stored away). Change them to suit the area.
3. Or select Add an item, type what is checked, tick An ATP reading is taken for an item checked with an ATP swab, and select Add.

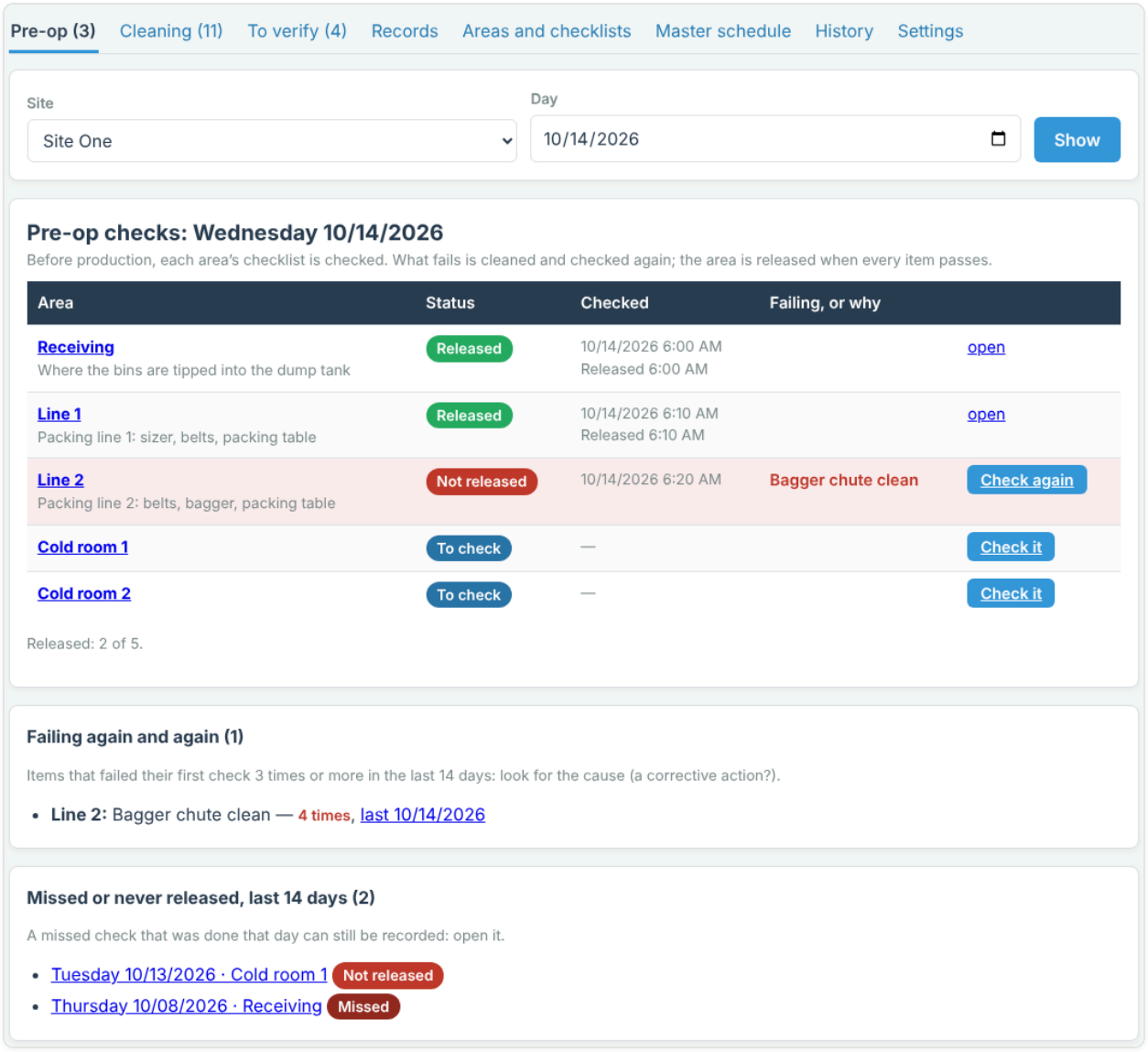


An area's pre-op checklist

change on an item renames it or makes it an ATP reading; Stop checking it takes it off the checklist, and Move up moves it up. Checks already recorded keep the items as they were. stop using the area, for an area no longer used, takes off its check of today with nothing recorded and its cleaning still to do; its cleaning tasks aren't due until Use it again.

THE PRE-OP CHECK

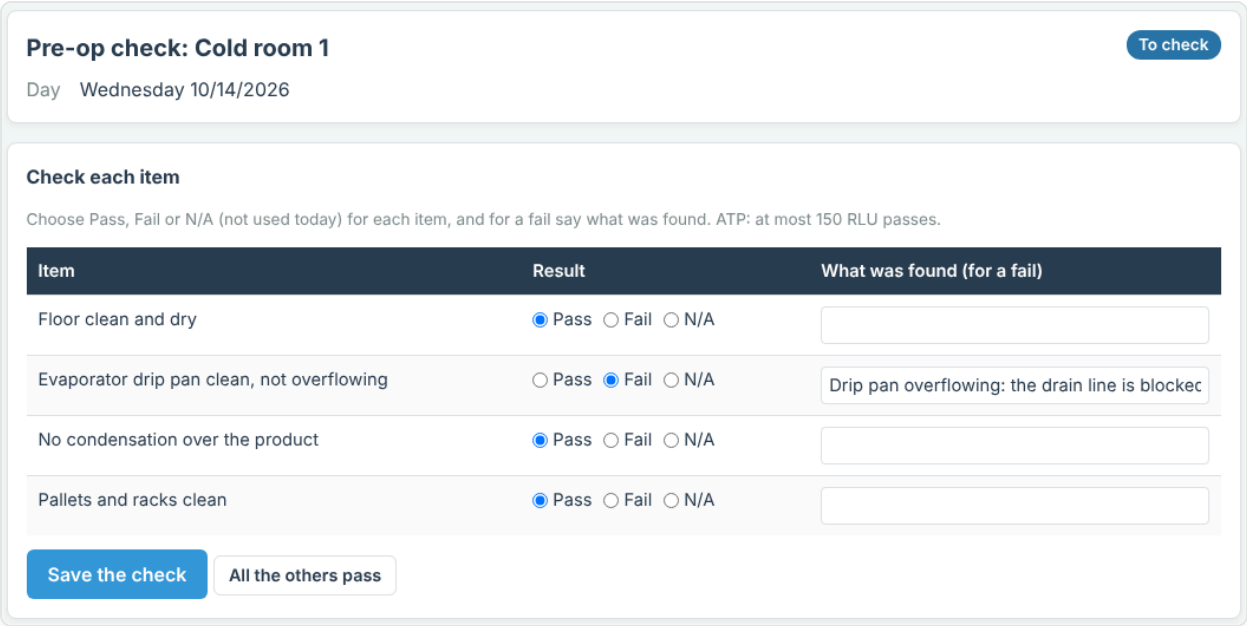
Every production day (Monday to Friday to start with), each area in use with a checklist has a pre-op check due. Pre-op, where the page opens for those who check, lists the day's checks with their status and what is still failing; choose a Day to see another.



The pre-op checks of the day

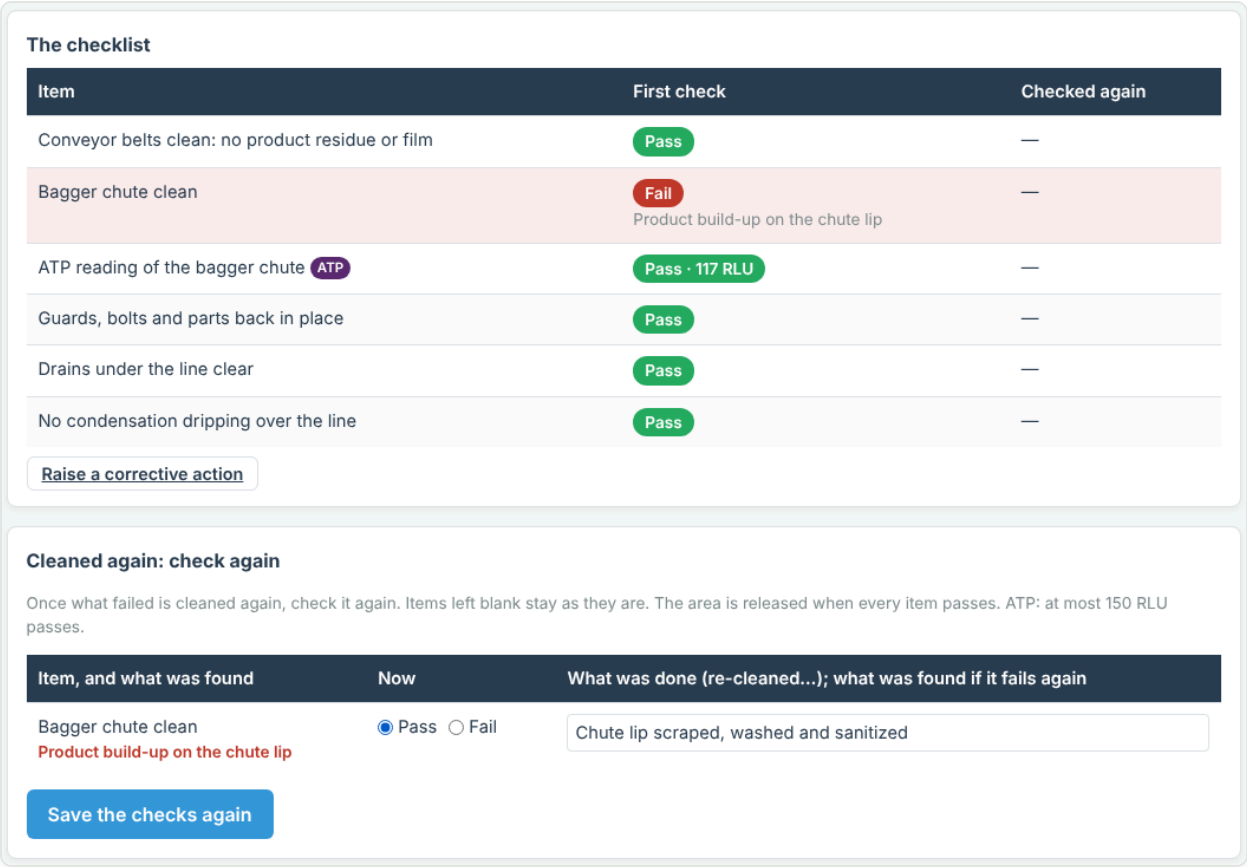
To check an area:

1. Select Check it next to the area.
2. For each item, choose Pass, Fail or N/A (not used today), and for a fail, type what was found. For an ATP item, type the reading in RLU: at most 150 passes. All the others pass chooses Pass for the items not answered yet.
3. Select Save the check.



Checking an area before production

- Every item passing: the area is Released for production.
- An item failing: the area is Not released. What failed is cleaned again; then, under Cleaned again: check again, choose its result now, type what was done, and select Save the checks again. Items left blank stay as they are. Check again as many times as needed: the area is released when every item passes.
- Release it anyway (Quality Control Managers): for production to start with something still failing that can't touch the product (the part isn't used today, it is covered…), saying why.
- No production in this area that day, with why if you want, for an area not used that day. There was production after all: check it puts the check back.
- On a day that isn't a production day (a Saturday…), Add a pre-op check today, on Pre-op, adds a check for an area with production.



A check that failed, to check again after cleaning

A check shows its checklist with each item's first check and the checks after it, with who did them and when. Add its Photos and papers (what was found, the ATP printout...). Raise a corrective action starts one from a check where an item failed (see 6.9).

> **Note:** A check with nothing recorded by the end of its day is missed. One that was done (on paper, say) can still be recorded in the next 14 days, as it was found that day: open it under Missed or never released, on Pre-op. Failing again and again, also on Pre-op, lists the items that failed their first check 3 times or more in the last 14 days: look for the cause.

THE MASTER SCHEDULE

Under Master schedule, Quality Control Managers list the cleaning tasks: what is cleaned, where, how and how often.

1. Under Add a cleaning task, type what is cleaned (Line 2 conveyor belts and bagger...), choose its Area (or none, for the whole packing house), and type How (the steps) and With what (the chemical and its strength), with its Registration no. if you want (the EPA Reg. No. in the United States; in Canada the Health Canada number, or the PCP Reg. No. or DIN).
2. Choose How often: every so many days, weeks or months (1 to 12), and From, the day it starts.
3. Select Add the task.

Pre-op (3) Cleaning (11) To verify (4) Records Areas and checklists **Master schedule** History Settings

Master sanitation schedule: Site One

Print

What is cleaned, how, with what and how often. Each period a task is due once; the crew records it done and QC verifies it. Production days: Mon to Fri.

What	How, with what	How often	This period	Last done
Receiving dump tank and flume Receiving ▸ change	Drain; remove the soil and leaves; scrub the tank and flume walls; rinse; sanitize. **Peracetic acid 80 ppm**	Every production day from 09/14/2026	To do 10/14/2026	10/13/2026
Line 1 conveyor belts and sizer Line 1 ▸ change	Dry clean the debris; rinse from the top down; foam and scrub the belts and cups; rinse; sanitize and let air-dry. **Chlorinated alkaline foam 3%; quat sanitizer 200 ppm**	Every production day from 09/14/2026	To do 10/14/2026	10/13/2026
Line 2 conveyor belts and bagger Line 2 ▸ change	Dry clean the debris; rinse from the top down; foam and scrub the belts and the bagger chute; rinse; sanitize and let air-dry. **Chlorinated alkaline foam 3%; quat sanitizer 200 ppm**	Every production day from 09/14/2026	To do 10/14/2026	10/13/2026
Cold room 1 floor Cold room 1 ▸ change	Move the pallets; sweep; scrub with the floor machine; squeegee dry. **Neutral cleaner**	Every week from 09/14/2026	Done, to verify 10/12/2026 – 10/18/2026	10/13/2026
Cold room 1 evaporator and drip pan Cold room 1 ▸ change	Lock out the fan; clean the coils with the coil cleaner; scrub and sanitize the drip pan and the drain line. **Coil cleaner; quat 200 ppm**	Every month from 09/01/2026	To do 10/01/2026 – 10/31/2026	09/24/2026
Cold room 2 floor Cold room 2 ▸ change	Move the pallets; sweep; scrub with the floor machine; squeegee dry. **Neutral cleaner**	Every week from 09/14/2026	To do 10/12/2026 – 10/18/2026	10/08/2026
Cold room 2 evaporator and drip pan Cold room 2 ▸ change	Lock out the fan; clean the coils with the coil cleaner; scrub and sanitize the drip pan and the drain line. **Coil cleaner; quat 200 ppm**	Every month from 09/01/2026	To do 10/01/2026 – 10/31/2026	
Packing room floors and drains ▸ change	Sweep; foam the floor and the drain covers; scrub; rinse to the drains; squeegee dry. **Chlorinated alkaline foam 3%**	Every production day from 09/14/2026	To do 10/14/2026	10/13/2026
Drains: deep clean ▸ change	Lift the covers and baskets; scrub inside the drains with the drain brushes (drain tools only); rinse; foam; put back. **Quat 400 ppm (drains)**	Every week from 09/14/2026	To do 10/12/2026 – 10/18/2026	10/08/2026
Forklifts and pallet jacks ▸ change	Blow off; wash the forks, wheels and mast; sanitize the forks. **Quat 200 ppm**	Every week from 09/14/2026	To do 10/12/2026 – 10/18/2026	10/01/2026
Packing room walls and doors ▸ change	Rinse the walls to 2 m and the doors; foam; scrub; rinse. **Chlorinated alkaline foam 3%; quat sanitizer 200 ppm**	Every 2 weeks from 09/14/2026	To do 10/12/2026 – 10/25/2026	09/25/2026
Overhead pipes, lights and beams ▸ change	From the lift: dry wipe, then wipe with sanitizer; cover the lines first. **Quat 200 ppm**	Every 3 months from 07/01/2026	To do 10/01/2026 – 12/31/2026	09/18/2026

The master sanitation schedule

Every day means every production day. Weeks run Monday to Sunday and months from the 1st; every 2 days, weeks or months counts from the day it starts. Each

period the task is due once, by the period's last day. The list shows each task's period now and when it was last done; change changes it, or stops using it, which takes off its period still to do.

RECORDING THE CLEANING

Cleaning, where the page opens for the sanitation crew, lists the cleaning tasks due now, soonest first, with how and with what. Print the list to take it along. When the cleaning is done:

1. Tick what was cleaned.
2. Check the day it was Done on (in its period, not after today) and add a Note if needed.
3. Select Record the ticked as done.



The cleaning to do

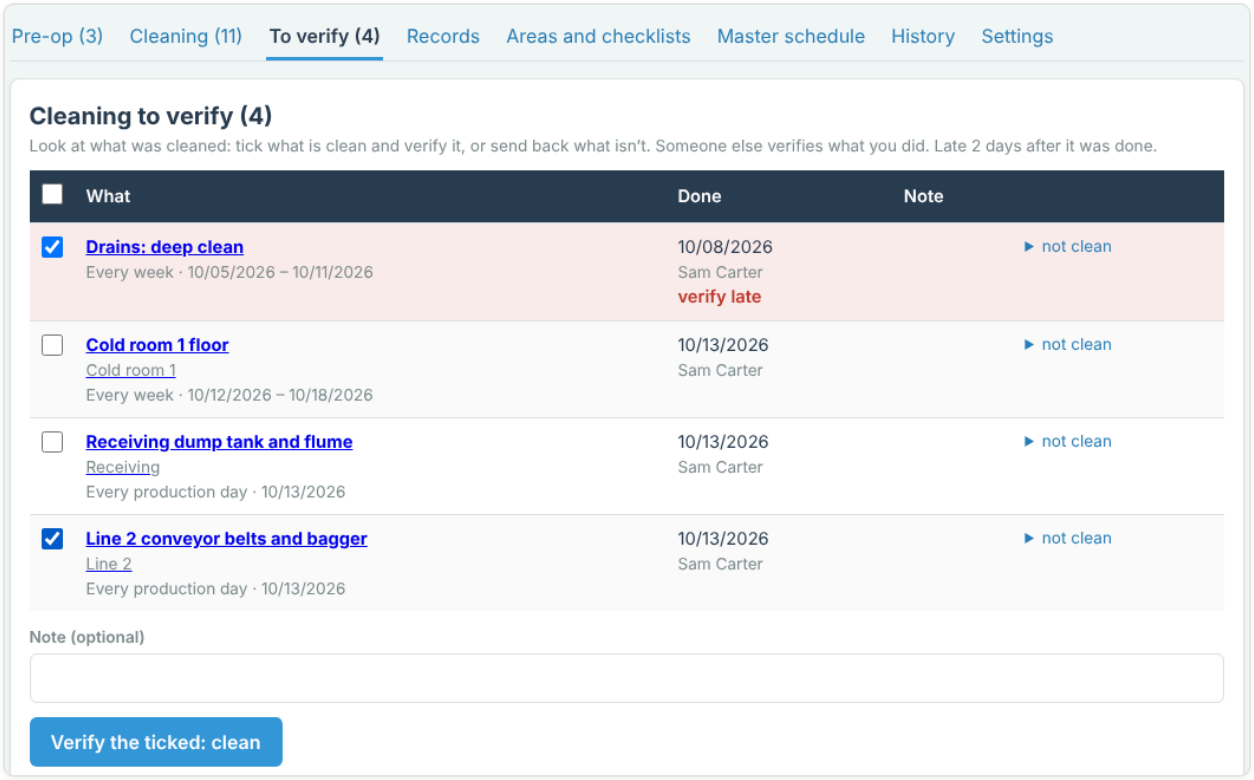
- A task not recorded in its period is missed. Missed in the last 14 days lists them: one that was done in time can still be recorded, with the day it was done.

- skip (Quality Control Managers and the checkers) takes off a task that can't be done this period, saying why (out of service...).
- A task sent back as not clean shows first, with what was found: it is to be done again, by today.
- Take it back (recorded by mistake), on the task's page, takes back cleaning recorded by mistake before it is verified (who recorded it, or a Quality Control Manager).

VERIFYING THE CLEANING

To verify lists the cleaning recorded done, oldest first; it is late to verify 2 days after it was done. Look at what was cleaned, then:

1. Tick what is clean, add a Note if needed, and select Verify the ticked: clean.
2. For one that isn't clean, select not clean, type what was found, and select Send it back: it is to be done again, by today.



The cleaning to verify

> **Note:** Someone other than who did the cleaning verifies it: your own shows yours and can't be ticked. When no one else at the site checks and verifies, you can verify your own.

Records lists the pre-op checks or the cleaning of the dates chosen, for an area or all, to print. History lists everything done, including what Continuum QC marked missed.

> **Note:** The Settings (Quality Control Managers) say the Production days, the pre-op ATP reading that passes (150 RLU to start with), the days after which cleaning is late to verify (2), when an item is failing again and again (3 failed first checks in 14 days), who besides the Quality Control Managers does the pre-op checks and verifies the cleaning (the Users with the Sanitation permission), whether sanitation is paused (no production, out of season: no checks or cleaning are due, and those still to do are taken off), and whether Trend Alerts reports the checks missed or not released, the items failing again and again and the cleaning missed or not verified in time (see 6.13).

IN THE FOOD SAFETY APP

Pre-op checks and cleaning can also be recorded in the Food Safety app (see 6.71). Its Pre-op inspection lists each area with a checklist and its items: Yes (clean and ready), No (with what was found) or N/A (not used today), and an ATP reading in RLU. A finished run is the area's pre-op check of its day (a run of today starts the check if there is none yet); while the check is failing, the run is its check again. Only Quality Control Managers and the Users ticked under Who does the pre-op checks and verifies cleaning, besides the QC Managers in the Settings can record it: tick the inspectors who use the app. Its Cleaning done lists each cleaning task: a run answered Yes records the task's cleaning of the period as done, to verify here as usual.

In the add and change forms of an area, Location in the Food Safety app and Area in the Food Safety app say where the app lists the area and its cleaning tasks (see 6.72).

6.42 Label Checks

Packing house > Label Checks checks the labels on the packing lines against the approved labels, the label masters: at start-up on each line every production day, at each label change, and every few hours while a line runs. Each check goes item by item through what the approved label must show, with the codes printed on it (the lot, the pack date, the voice pick code) read as they are. A wrong label is corrected and checked again, with what was done with the product packed since the last right check.

Who	What they do
Everyone with the Label Checks permission	See the lines, the checks, the approved labels, the records and the history.
Quality Control Managers, and the Users chosen in the Settings	Record the label checks, check a wrong label again once it is corrected, add pictures, and mark a line not running.
Quality Control Managers	Keep the lines, the approved labels and the settings, and close a wrong label without checking it again.

LINES AND APPROVED LABELS

Quality Control Managers list the packing lines under Lines: under Add a line, type its Name (Line 1, Bagger...) and a Description if you want, and select Add the line. A line added has its start-up check due from today. change renames a line; stop using the line, for one no longer used, takes off its start-up check of today still to do, and nothing is due for it until Use it again.

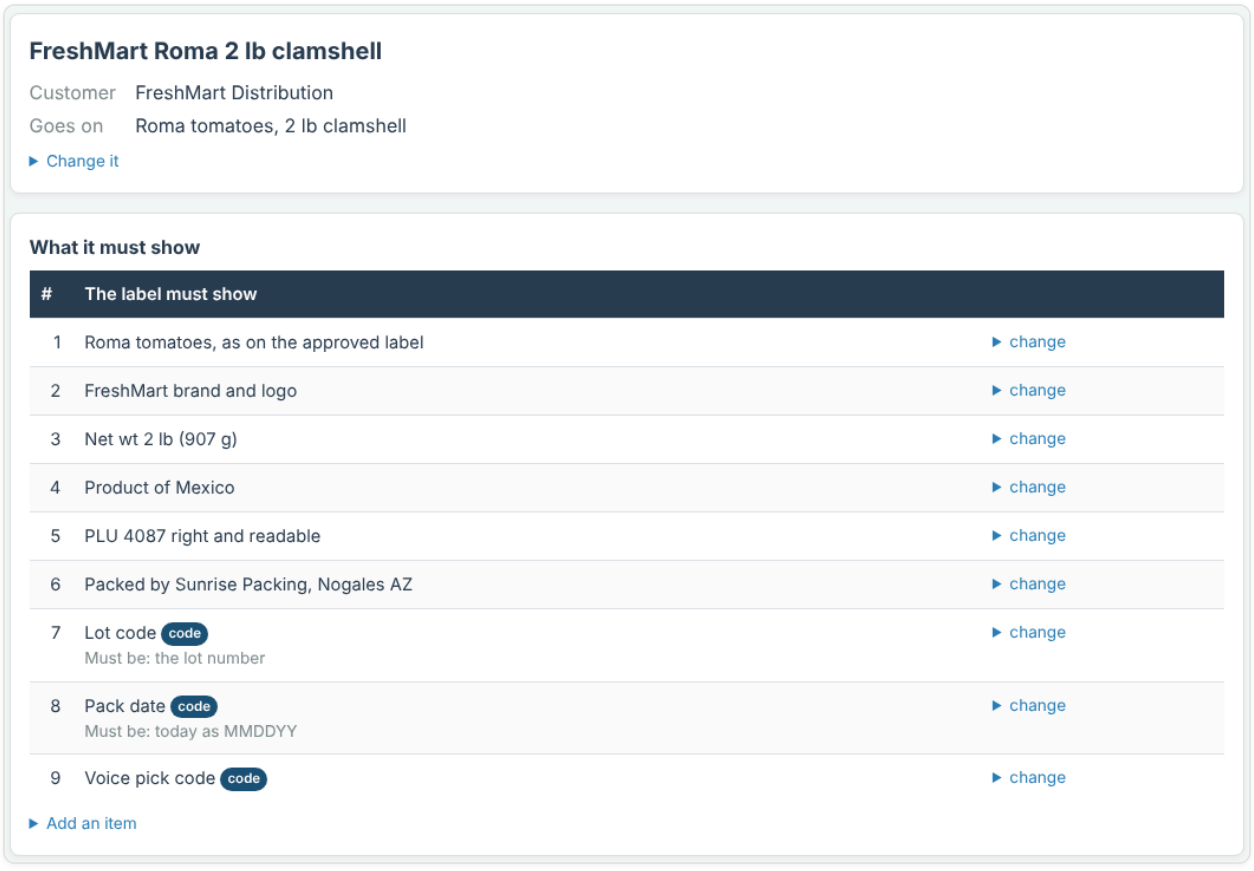
Under Approved labels, each label master has what it must show, item by item:

1. Under Add an approved label, type its Name (FreshMart Roma 2 lb clamshell...), the Customer and What it goes on if you want, and select Add the approved label. To start with the items of another label, choose it under Start with the items of.
2. Select Start from the usual items of a produce label: ten items, eleven in Canada (the product and variety, the customer’s brand and logo, the net weight

or count (in Canada, the net quantity in metric units), the grade name where a grade is prescribed, the country of origin, in Canada the mandatory information in English and French, the PLU or barcode, the packer's or distributor's name and address, the lot code, the pack date and the voice pick code). Change them to suit the label.

3. Or select Add an item, type what the label must show, and choose whether it is shown as on the approved label or A printed code to read; for a code, type what it must be if you want (the lot number, today as MMDDYY). Select Add.
4. Under The approved label, add photos or PDFs of the label as approved (up to 6), for whoever checks.

> **Note:** In Canada, consumer prepackaged fresh fruits and vegetables must show a lot code: an approved label at a Canadian site that checks no lot code says so, under What it must show.

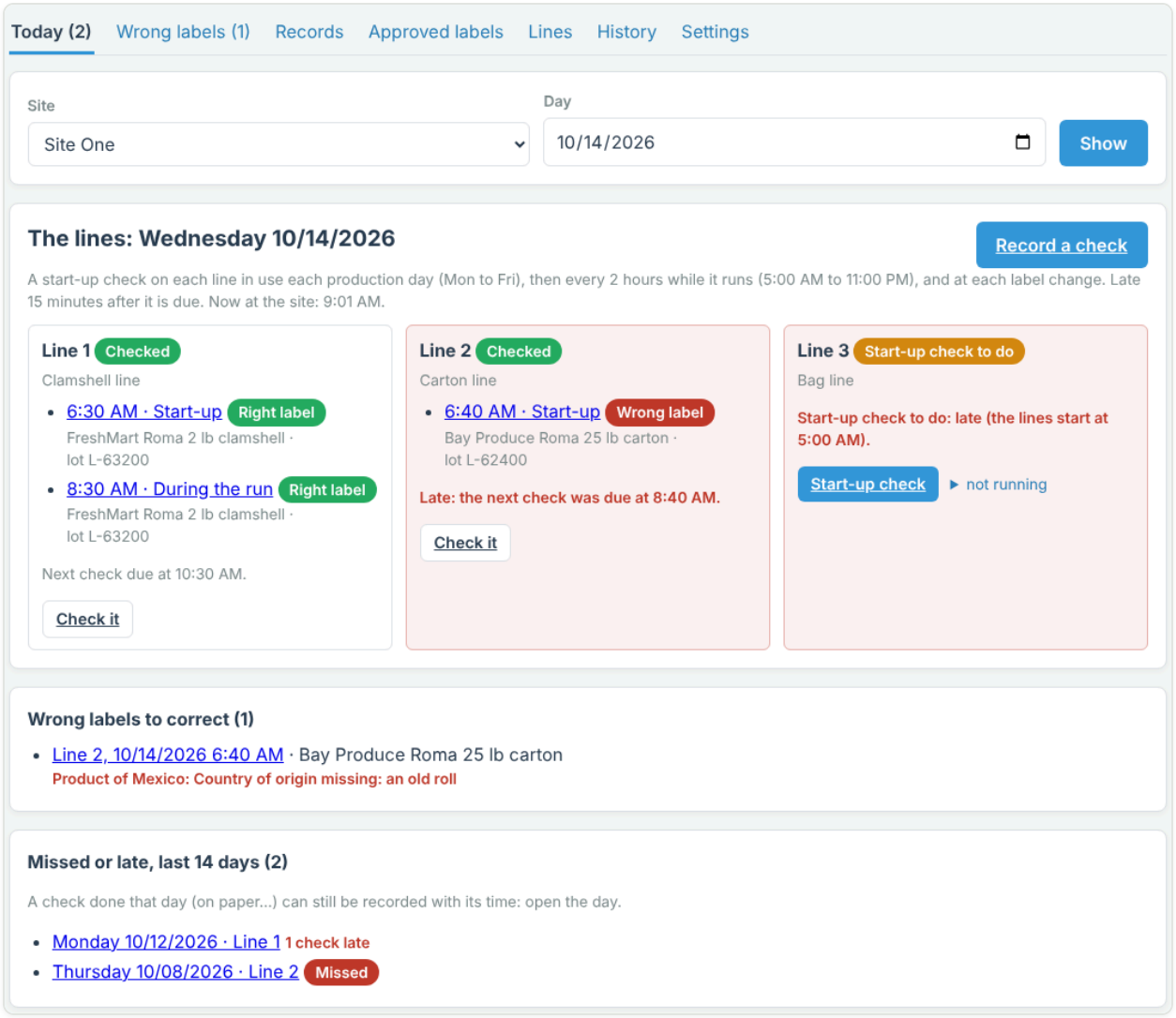


An approved label and what it must show

change on an item changes its wording or kind; Stop checking it takes it off the label, and Move up moves it up. Checks already recorded keep the items as they were. Stop using it, under Change it, for a label no longer used: it isn’t offered for checks.

TODAY

Today, where the page opens, shows each line in use with its checks of the day and when the next is due: a start-up check each production day (Monday to Friday to start with), then a check every 2 hours while the line runs (from 6:00 AM to 6:00 PM to start with; Settings), and one at each label change. What is late shows in red: a start-up check not done 15 minutes after the lines start, or a check more than 2 hours and 15 minutes after the last. Below the lines, the wrong labels to correct and the days missed or with checks late in the last 14 days. Choose a Day to see another.

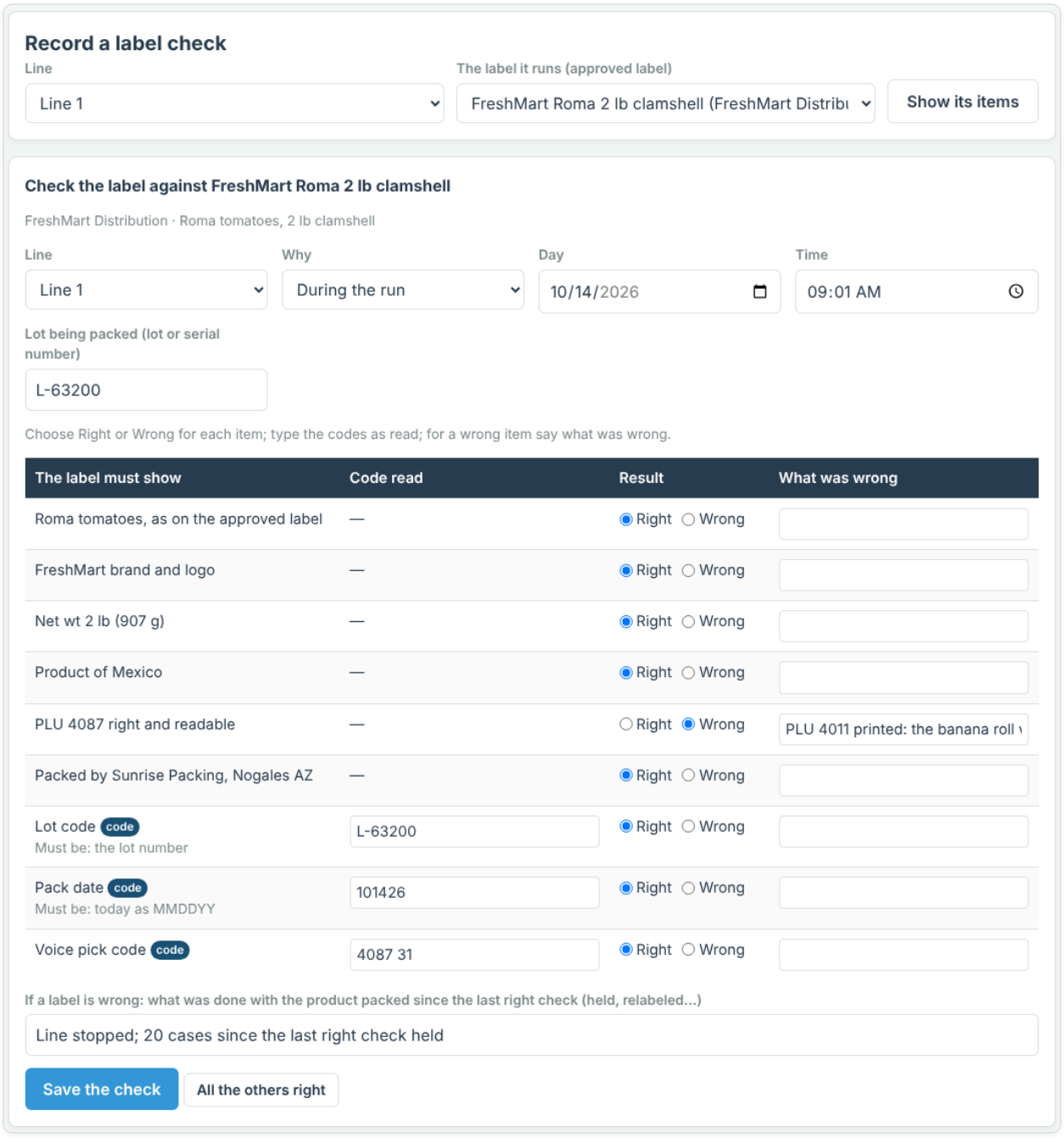


The lines of the day

To check a line's label:

1. Select Start-up check or Check it on the line (or Record a check), and choose the approved label it runs: its items show.
2. Check Why (Start-up, Label change, During the run, Other, or End of the run: nothing is due after it), the Day and Time (now; or the time it was done, up to 14 days back, for a check done on paper), and type the Lot being packed (a lot or serial number: the check is linked to that lot's inspection).
3. For each item, choose Right or Wrong; type each code as it is read; for a wrong item, type what was wrong. All the others right chooses Right for the items not answered yet.

4. For a wrong label, type what was done with the product packed since the last right check (held, relabeled...).
5. Select Save the check.

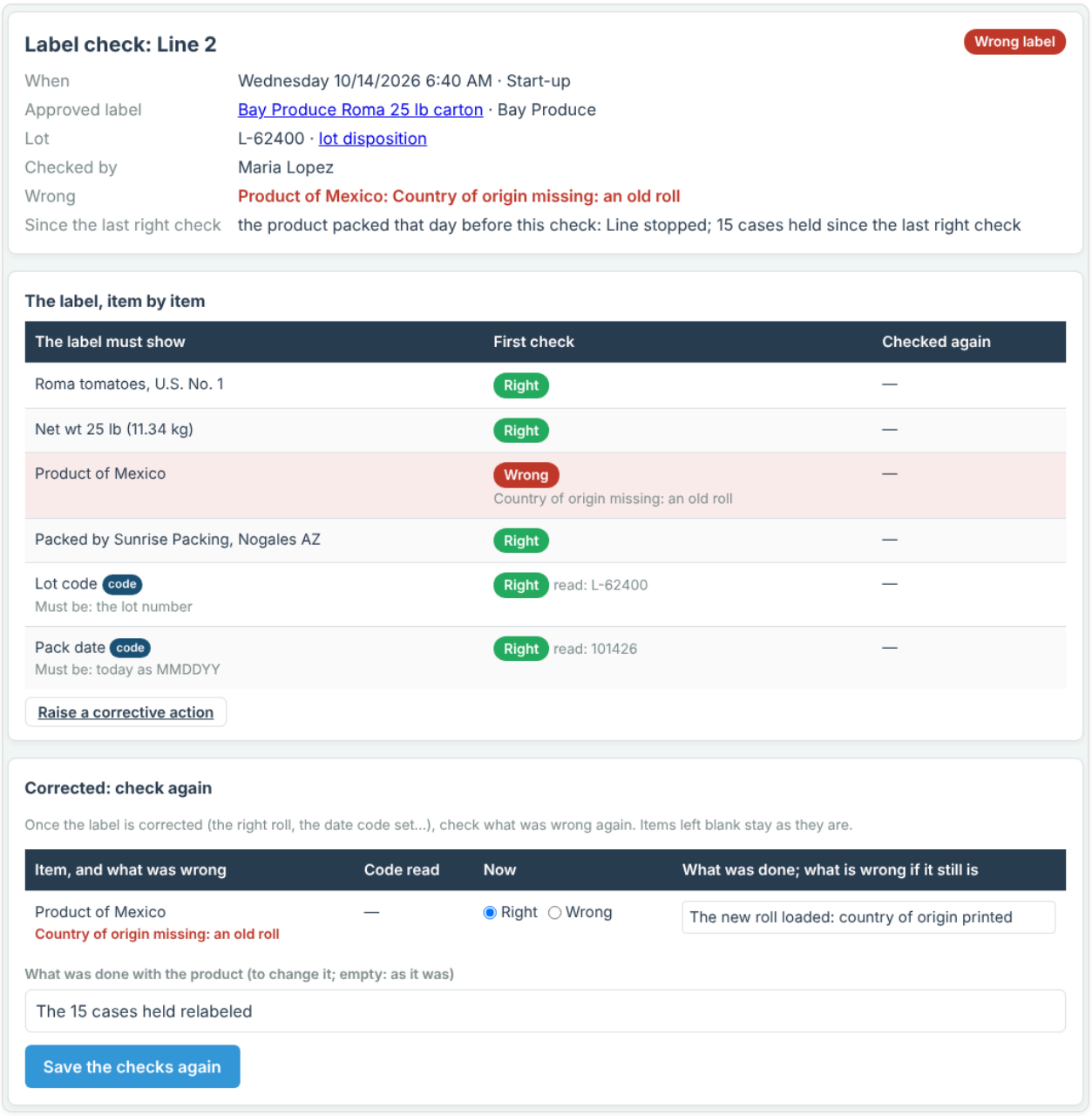


Checking a line's label against the approved label

- Every item right: the right label.
- An item wrong: a wrong label. Correct it on the line (the right roll, the date code set...); then, under Corrected: check again, choose its result now, type what

was done, and select Save the checks again. Items left blank stay as they are. Check again as many times as needed: the label is corrected when every item is right.

- Close it without checking again (Quality Control Managers): when the label can't be checked again on the line (the run ended, the product was relabeled off the line...), saying why.
- not running, on a line with no check, with why if you want, for a line not running that day. It was running after all puts its start-up check back.



A wrong label, to check again after correcting it

A check shows the label item by item, as found and each time it was checked again, with who and when, and the product packed since the last right check. Add Pictures of the label as found (up to 12). Raise a corrective action starts one from a wrong label (see 6.9). The inspection of the lot checked links to its label checks, with a warning while a wrong label on it isn't corrected.

> **Note:** A start-up check not recorded by the end of its day is missed. One that was done (on paper, say) can still be recorded in the next 14 days, with its day and time: open the day under Missed or late, on Today. Wrong labels lists those still to correct and those corrected or closed in the last 30 days.

Records lists the label checks of the dates chosen, for a line, an approved label or all, or the lines' days (the start-up check done, missed or not running, and the checks late), to print. History lists everything done, including what Continuum QC marked missed.

> **Note:** The Settings (Quality Control Managers) say the Production days, how often a line is checked while it runs (every 2 hours to start with; 0: only at start-up and label changes), when the lines start and stop (6:00 AM and 6:00 PM), when a check is late (15 minutes), who besides the Quality Control Managers checks the labels (the Users with the Label Checks permission), whether label checks are paused (no production, out of season: nothing is due, and today's start-up checks still to do are taken off), and whether Trend Alerts reports the wrong labels and the checks missed or late (see 6.13).

6.43 Wash Water

Packing house > Wash Water checks the water where produce is washed or cooled, at each wash point (the dump tank, a flume, a spray bar, the hydrocooler...), against the limits set for it: the sanitizer (free chlorine, peracetic acid, chlorine dioxide or ozone) in ppm, the pH, the ORP in mV and the water temperature. Each wash point in use has a start-up check every production day,

then a check every hour or so while the water is in use. A reading out of range is corrected and read again, with what was done with the product washed since the last reading in range. The water changes of each wash point are recorded too, with when the next is due.

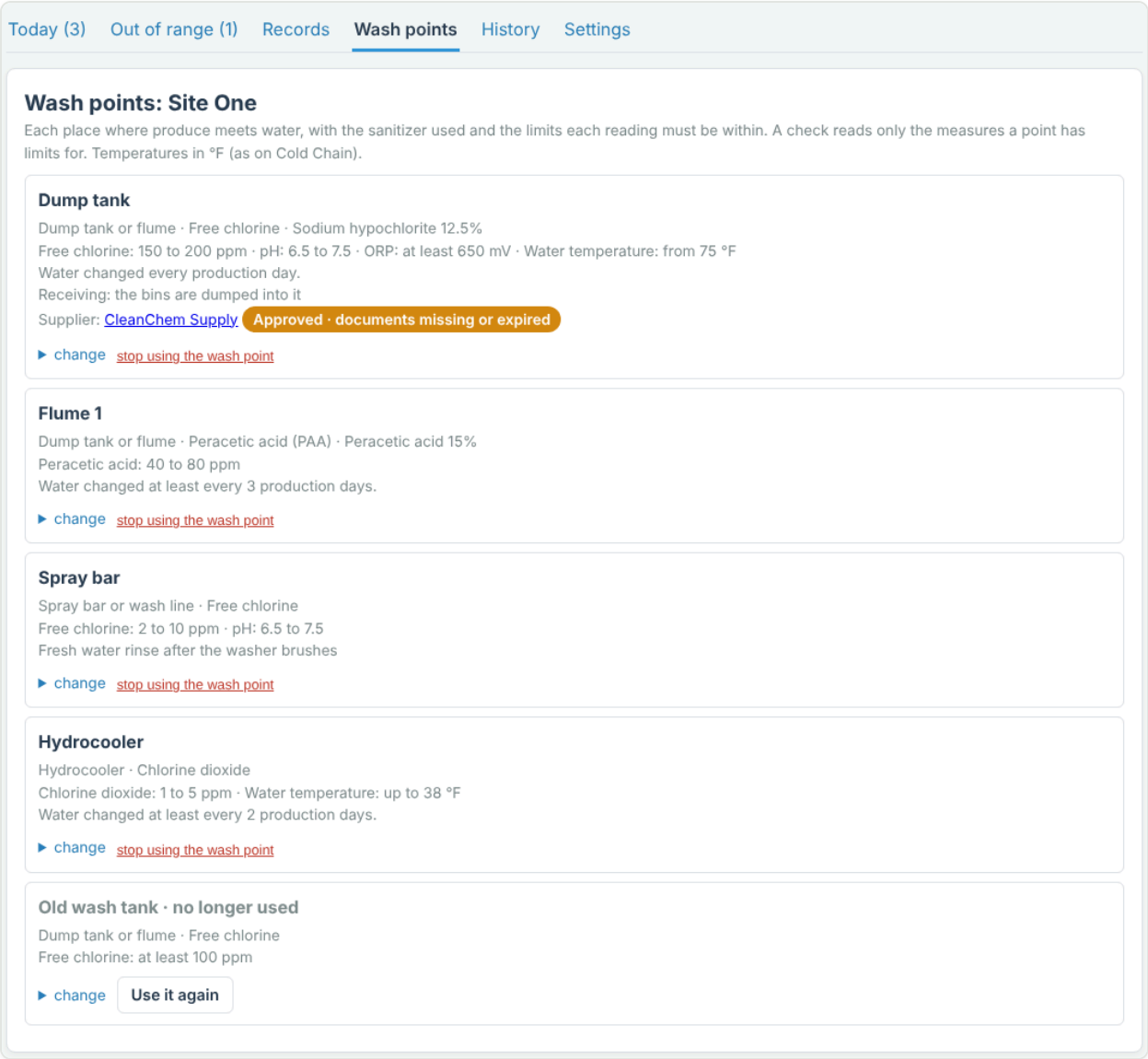
Who	What they do
Everyone with the Wash Water permission	See the wash points, the checks, the water changes, the records and the history.
Quality Control Managers, and the Users chosen in the Settings	Record the checks, read the water again once it is corrected, add pictures, record the water changes, and mark a wash point not running.
Quality Control Managers	Keep the wash points and the settings, close a reading out of range without reading it again, and void a water change.

WASH POINTS

Quality Control Managers list the wash points under Wash points:

1. Under Add a wash point, type its Name (Dump tank, Flume 1…), and choose its Kind (Dump tank or flume, Spray bar or wash line, Hydrocooler, Ice machine or injector, or Other) and its Sanitizer (Free chlorine, Peracetic acid (PAA), Chlorine dioxide, Ozone, Other sanitizer, or None (water only)). Type the Sanitizer product and its Registration no. if you want (the EPA Reg. No. in the United States; in Canada the Health Canada number, or the PCP Reg. No. or DIN); with Approved Suppliers, also choose Its supplier among the site’s suppliers (see 6.45).
2. Type the limits each reading must be within: Sanitizer at least (ppm), needed unless there is no sanitizer, and Sanitizer at most if you want; pH at least and pH at most; ORP at least (mV); Water at least and Water at most, in the unit set on Cold Chain (without it, the site’s country’s: °C in Canada, °F in the United States; see 6.34). Leave a measure empty when it isn’t read: a check reads only the measures with a limit, and at least one is needed.

3. Type how often the water is changed, under Change the water at least every (production days; 1 to start with, up to 30; 0: not tracked), and a Description if you want. Select Add the wash point.

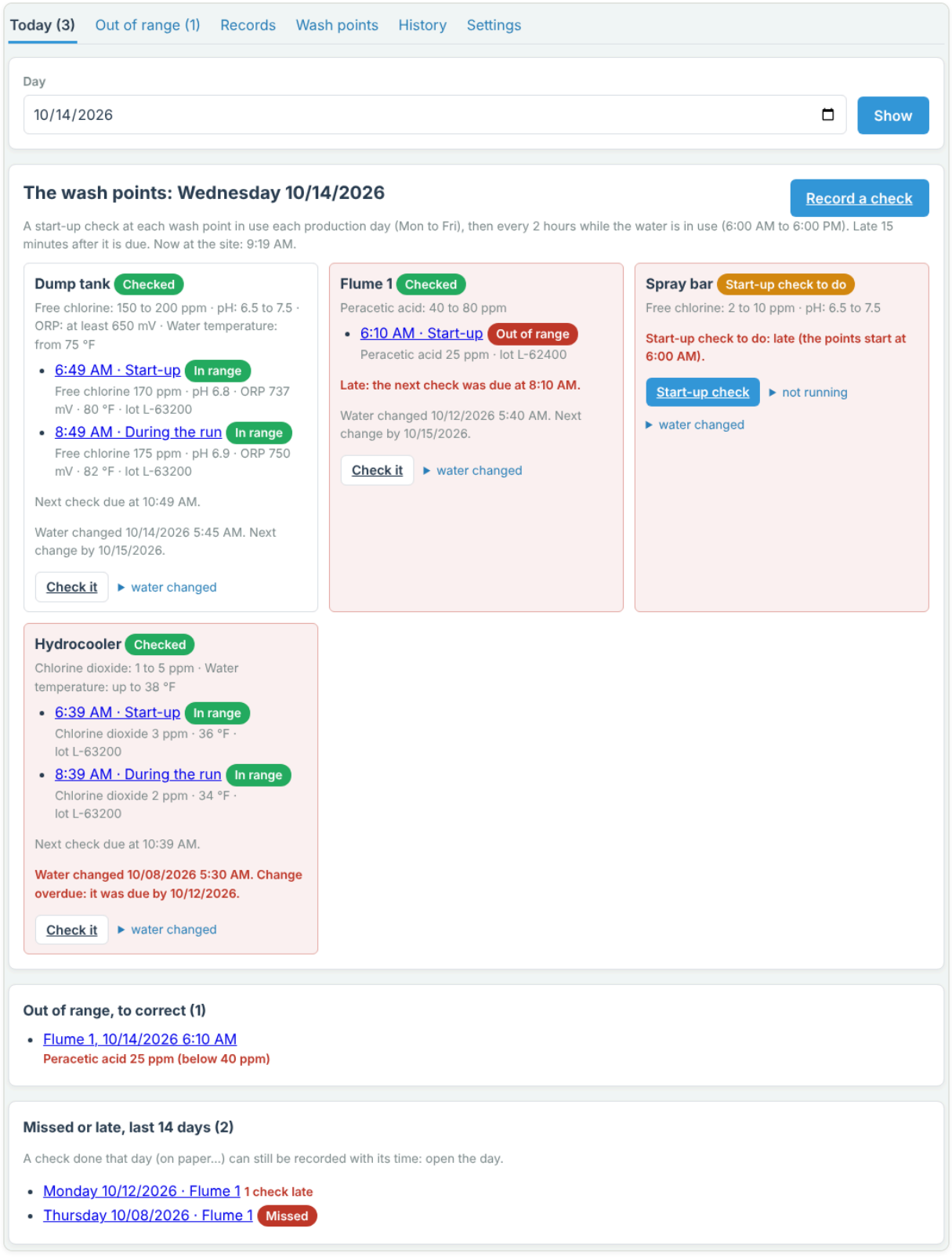


The wash points and their limits

A wash point added has its start-up check due from today; a site has up to 50, those no longer used included. change on a wash point changes its name, sanitizer, limits or water changes (select Save): checks already recorded keep the limits they were read against. A wash point's supplier shows with its standing on Approved Suppliers (Approved, Suspended, Approved · documents missing or expired...; see 6.45). stop using the wash point, for one no longer used, takes off its start-up check of today still to do, and nothing is due for it until Use it again.

TODAY

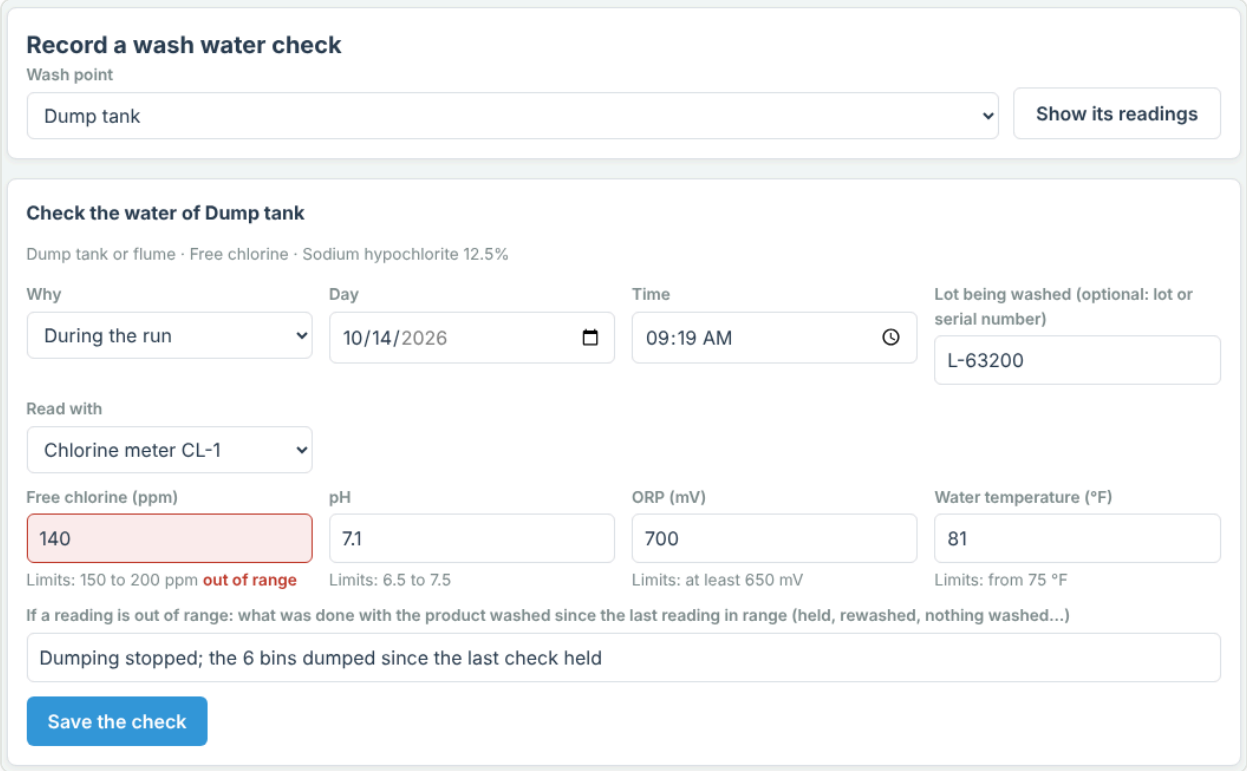
Today, where the page opens, shows each wash point in use with its checks of the day, when the next is due and when its water was last changed: a start-up check each production day (Monday to Friday to start with), then a check every hour while the water is in use (from 6:00 AM to 6:00 PM to start with; Settings). What is late shows in red: a start-up check not done 15 minutes after the wash points start, a check more than an hour and 15 minutes after the last, a reading out of range, or a water change overdue. Below the wash points, the readings out of range to correct and the days missed or with checks late in the last 14 days. Choose a Day to see another.



The wash points of the day

To check a wash point's water:

1. Select Start-up check or Check it on the wash point (or Record a check, and choose the Wash point): its measures show, each with its limits.
2. Check Why (Start-up, During the run, After a water change, Other, or End of the run: nothing is due after it), the Day and Time (now; or the time it was done, up to 14 days back, for a check done on paper), and type the Lot being washed if you want (a lot or serial number: the check is linked to that lot's inspection).
3. Under Read with, choose the instrument from Calibration Records (see 6.12), or Test strips or something else (type it) and type what it was read with.
4. Type each reading; one outside its limits is marked out of range as you type. If a reading is out of range, type what was done with the product washed since the last reading in range (held, rewashed, nothing washed...).
5. Select Save the check.

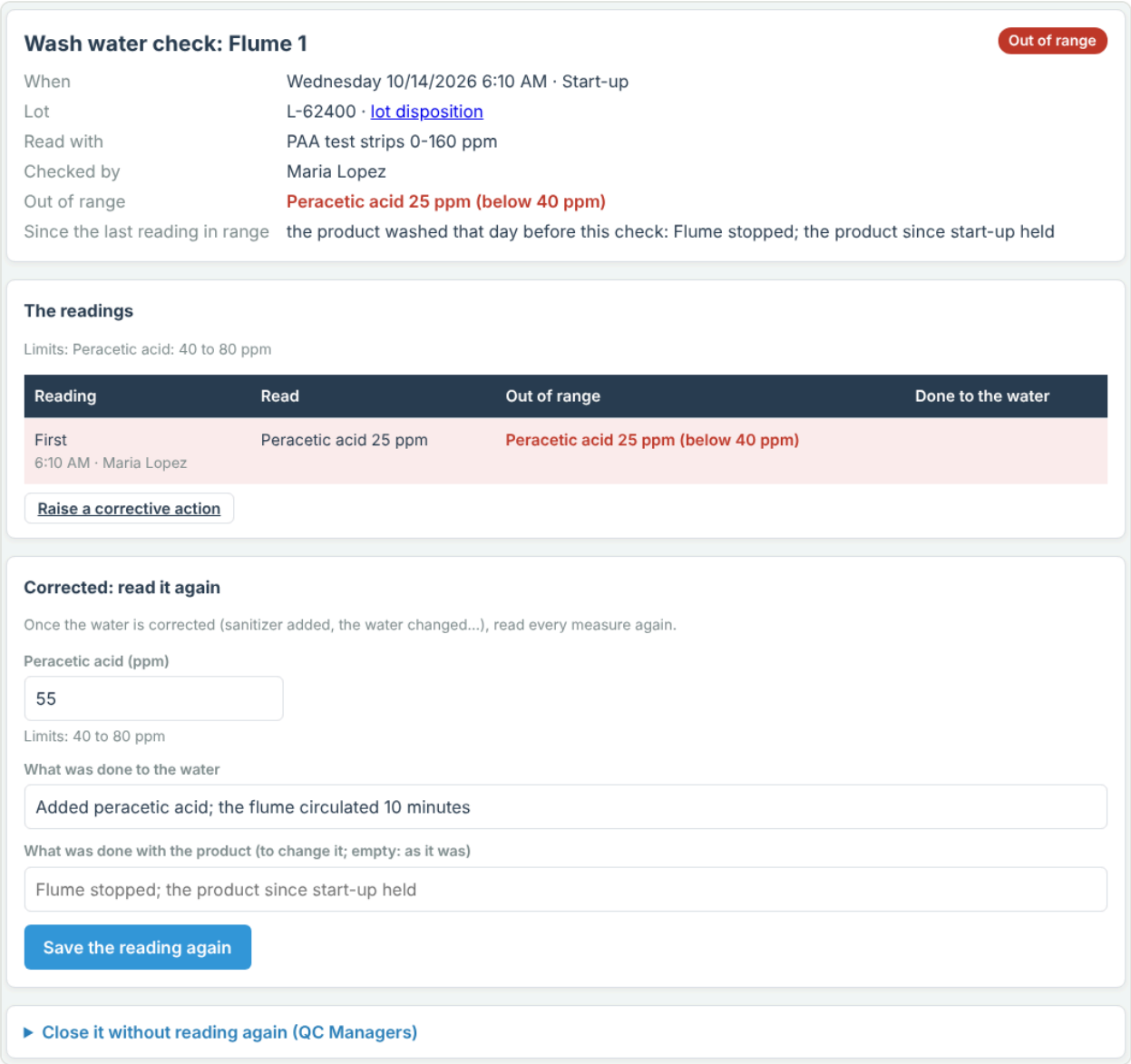


Checking a wash point's water against its limits

not running, on a wash point with no check that day, with why if you want, marks it not running that day: nothing is due for it. It was running after all puts its start-up check back.

READINGS OUT OF RANGE

- Every reading within its limits (the limits themselves included): In range.
- A reading outside them: Out of range. Correct the water (sanitizer added, the water changed…); then, under Corrected: read it again, type every reading again and What was done to the water, and select Save the reading again. Read it again as many times as needed: the check is Corrected when every reading is in range.
- Close it without reading again (Quality Control Managers): when the water can’t be read again (the run ended and the water was drained…), saying why. A reading out of range more than 14 days back can no longer be read again, only closed.



A reading out of range, to read again after correcting the water

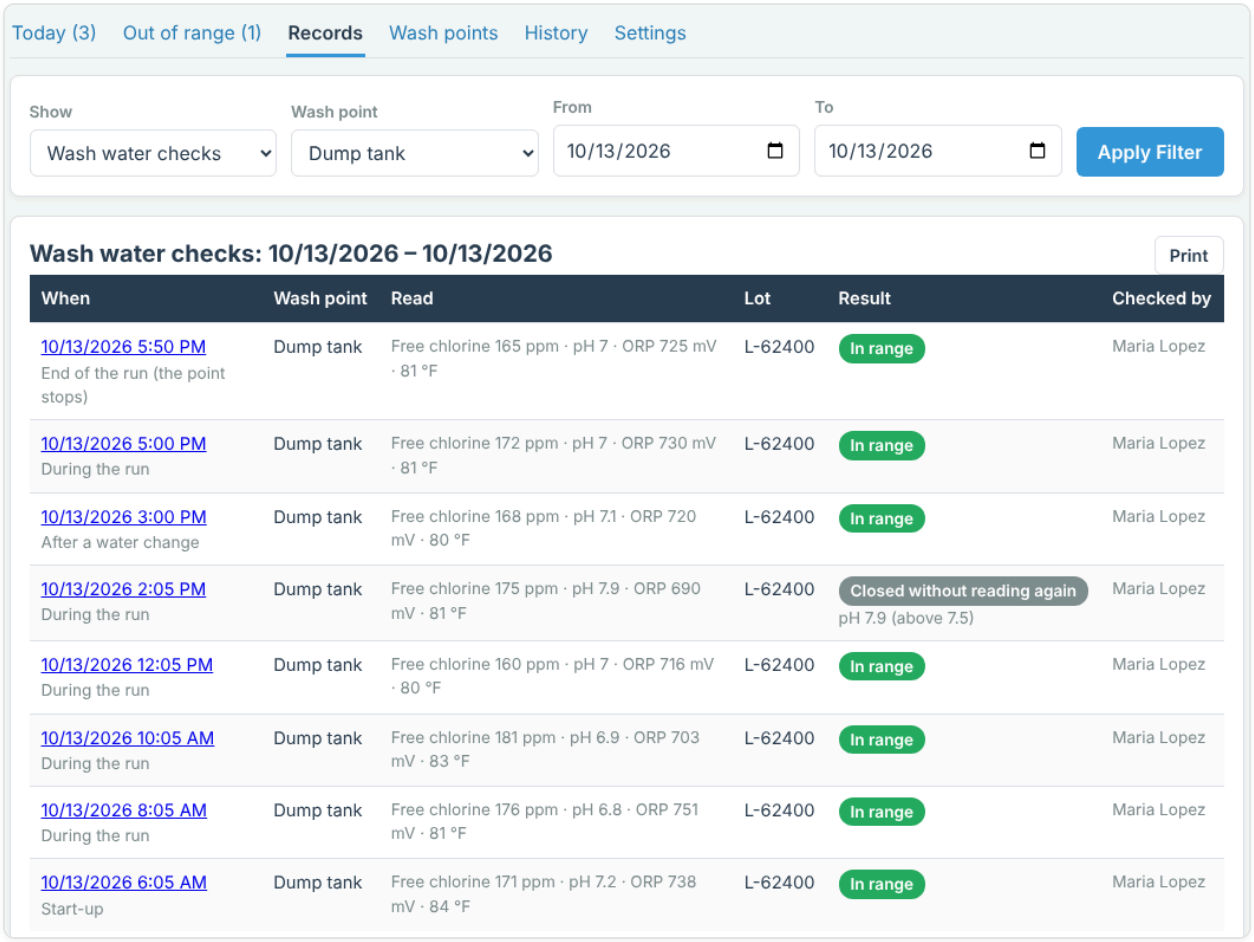
A check shows when it was done, the lot, what it was read with (and the instrument's calibration then, when it wasn't in date), who checked, each reading with who, when and what was done to the water, and what was done with the product washed since the last reading in range. Add Pictures (photos or PDFs: the test strip against its chart, the meter...; up to 6). Raise a corrective action starts one from a check out of range (see 6.9). The inspection of the lot links to its wash water checks, with a warning while a reading out of range with it isn't corrected.

> **Note:** A start-up check not recorded by the end of its day is missed. One that was done (on paper, say) can still be recorded in the next 14 days, with its day and time: open the day under Missed or late, on Today. Out of range lists the readings still to correct and those corrected or closed in the last 30 days.

WATER CHANGES

When a wash point's water is changed (drained, the tank cleaned and refilled), open water changed on the wash point, on Today: check the Day and Time (up to 14 days back), type What was done if you want, and select Record the water change. Today then shows when the water was changed and when the next change is due: the wash point's number of production days after the last change, so days without production don't make it late. Past that day the change is overdue, in red.

Records lists the Wash water checks, the points' days (the start-up check done, missed or not running, and the checks late) or the Water changes of the dates chosen, for a Wash point or All, to print. There a Quality Control Manager voids a water change recorded by mistake (void, saying why, then Void it): it no longer counts. History lists everything done, including what Continuum QC marked missed.



The checks of a day at a wash point

Note: The Settings (Quality Control Managers) say the Production days, how often the water is checked while it is in use (every hour to start with; 0: only at start-up), when the wash points start and stop (6:00 AM and 6:00 PM), when a check is late (15 minutes), who besides the Quality Control Managers checks the wash water (the Users with the Wash Water permission), whether wash water checks are paused (no production, out of season: no check or water change is due, and today's start-up checks still to do are taken off), and whether Trend Alerts reports the readings out of range, the checks missed or late and the water changes overdue (see 6.13).

IN THE FOOD SAFETY APP

Checks and water changes can also be recorded in the Food Safety app (see 6.71). Its Wash water check lists each wash point with why, the lot, what it was read with (the instruments in use, or Other (type it below)) and each reading with its limits; a finished run is a check, or, when the point's last reading was out of range (up to 14 days back), its reading again. Its Water changed records a water change when answered Yes. Only Quality Control Managers and the Users ticked under Who checks the wash water, besides the QC Managers in the Settings can record them: tick the inspectors who use the app.

In the add and change forms of a wash point, Location in the Food Safety app and Area in the Food Safety app say where the app lists it, for both logs (see 6.72).

6.44 Load Inspections

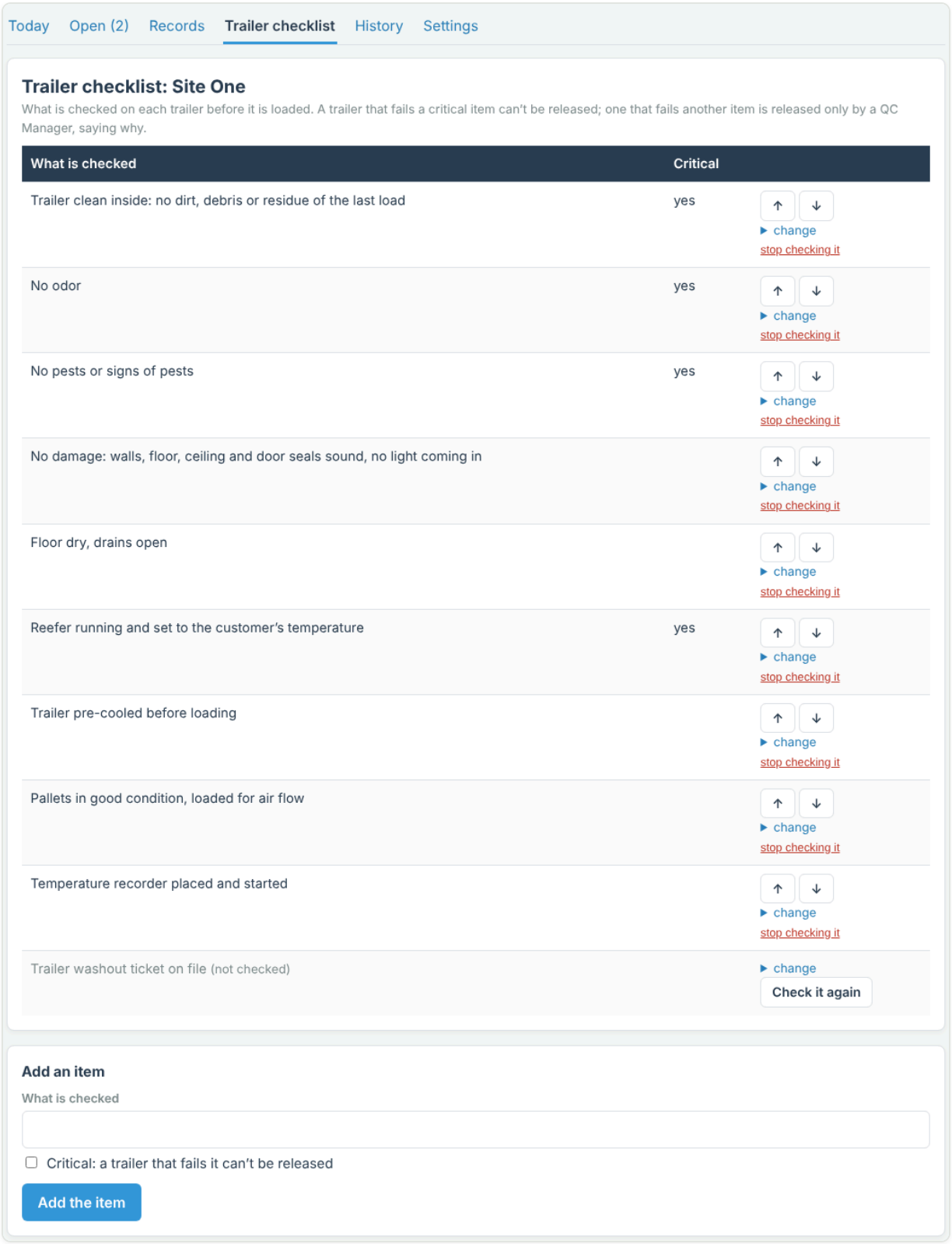
Lots > Load Inspections inspects each outbound load before it leaves the site: the trailer against the site's trailer checklist (clean, no odor, no pests, no damage, pre-cooled...), the reefer's reading against its setpoint, the pulp temperatures of the product loaded against their limits, the lots loaded with their cases, and the seal number. The load is then released (shipped) or rejected (the trailer turned away, or the load held). A load with a problem is released only by a Quality Control Manager, saying why, and a load whose trailer failed a critical item can't be released at all.

Who	What they do
Everyone with the Load Inspections permission	See the loads, the trailer checklist, the records and the history.
Quality Control Managers, and the Users chosen in the Settings	Inspect the loads, release those without problems or reject them, and add pictures.
Quality Control Managers	Keep the trailer checklist and the settings, release a load with problems, saying why, and cancel a load recorded by mistake.

THE TRAILER CHECKLIST

Quality Control Managers set up what is checked on each trailer before it is loaded, under Trailer checklist:

1. Select Start from the usual trailer checklist: nine items (the trailer clean inside, no odor, no pests or signs of pests, no damage and no light coming in, the floor dry and the drains open, the reefer running and set to the customer's temperature, the trailer pre-cooled, the pallets in good condition and loaded for air flow, and the temperature recorder placed and started). Four are critical: the trailer clean inside, no odor, no pests, and the reefer running and set. Change them to suit the site.
2. Or, under Add an item, type What is checked, tick Critical: a trailer that fails it can't be released if it is, and select Add the item. A site can have up to 40 items.



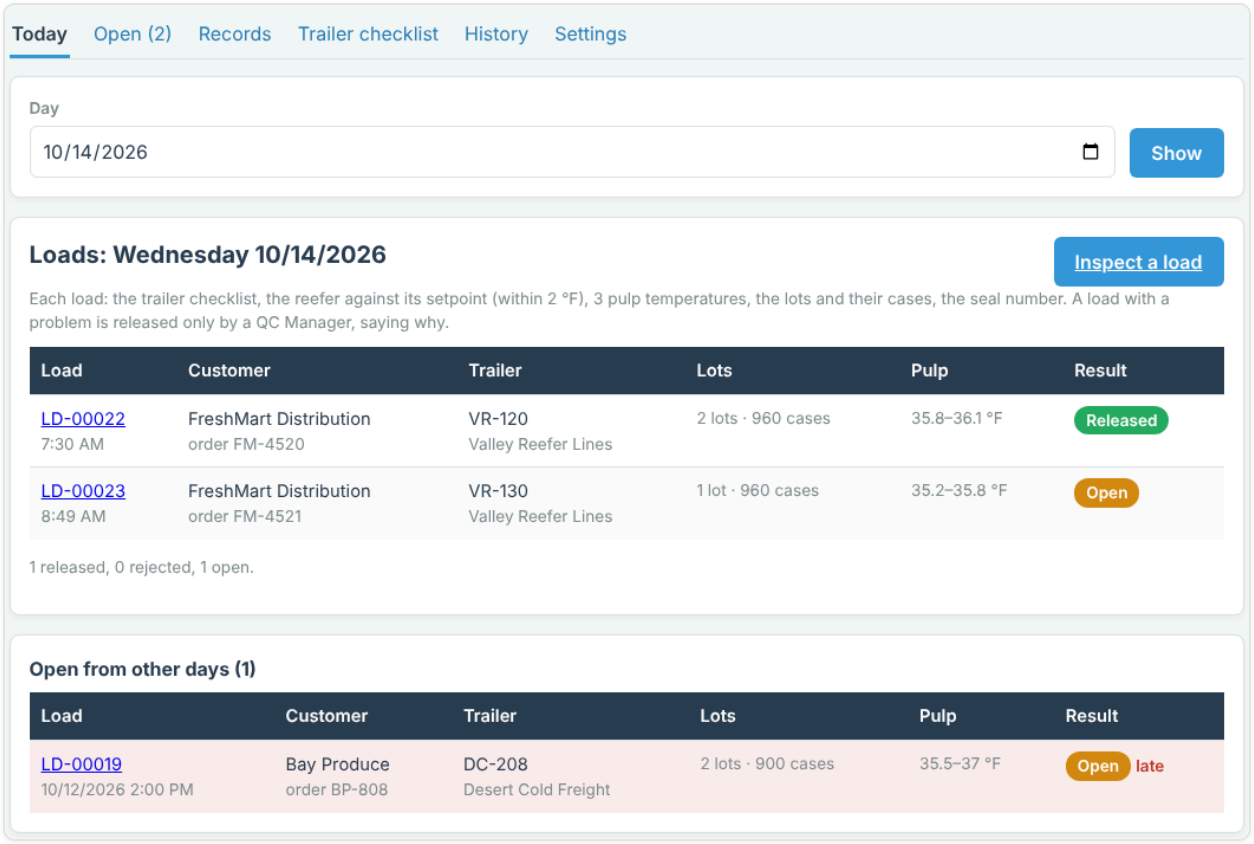
The trailer checklist

change on an item changes its wording or whether it is critical; the arrows move it up or down, and stop checking it takes it off the checklist until Check it again.

Loads already inspected keep the items as they were.

INSPECTING A LOAD

Today, where the page opens, lists the loads inspected that day with their customer, trailer and carrier, lots and cases, pulp temperatures and result; below them, the loads still open from other days. A load rejected or released with problems, or open too long, shows in red. Choose a Day and select Show to see another.

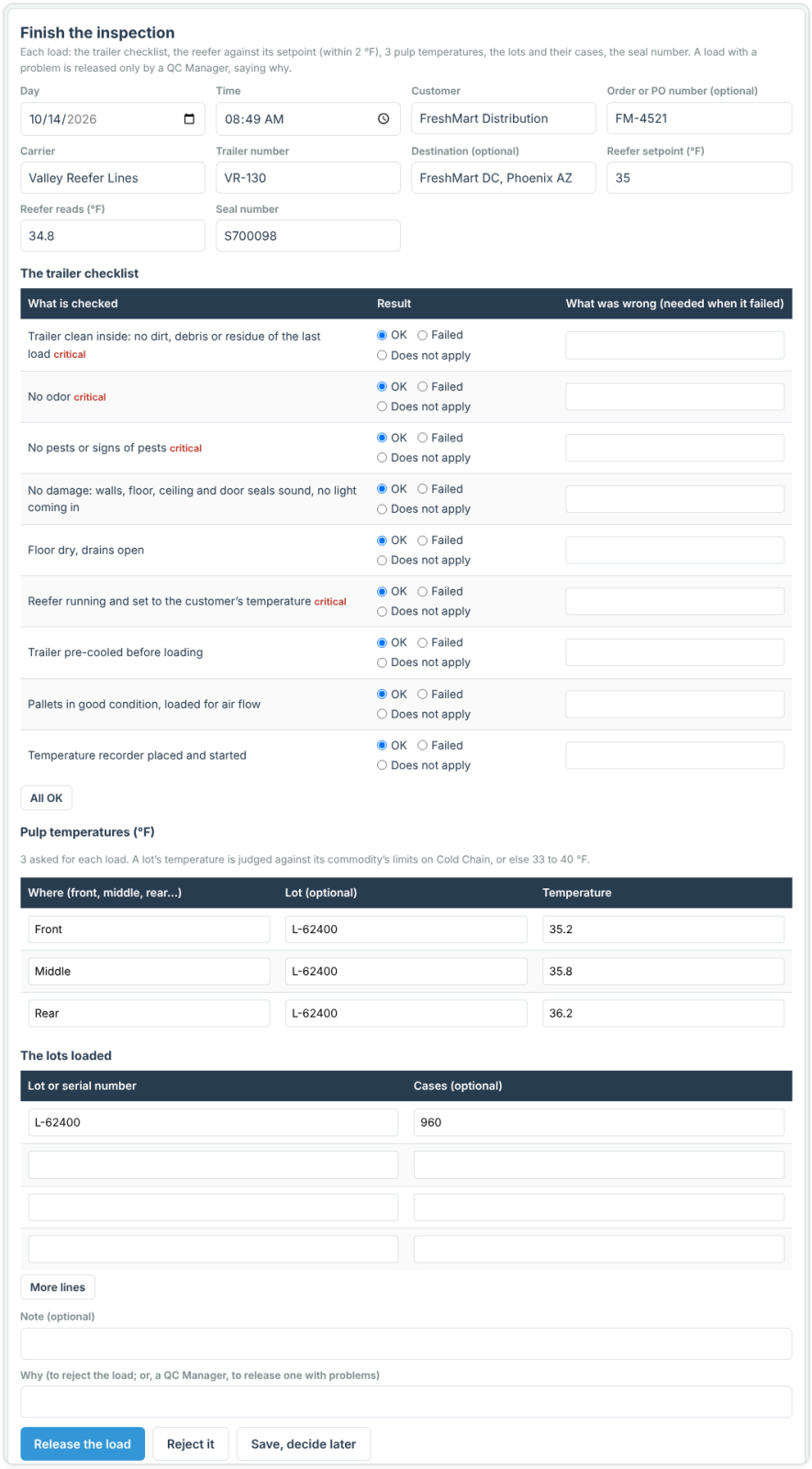


The loads of the day

To inspect a load:

1. Select Inspect a load, or open a load still open to finish its inspection.
2. Check the Day and Time (now; or the time it was done, up to 14 days back, for one done on paper), and type the Customer, the Order or PO number, the Carrier, the Trailer number and the Destination. The customers on Customer Specifications are offered; for the carrier, the suppliers on Approved Suppliers come first (see 6.45).

3. Type the Reefer setpoint, what the reefer shows under Reefer reads, and the Seal number.
4. Under The trailer checklist, choose OK, Failed or Does not apply for each item; for a failed item, type what was wrong. All OK chooses OK for the items not answered yet.
5. Under Pulp temperatures, type where each was read (front, middle, rear…), the Lot it was read on if you want, and the Temperature: 3 for each load to start with.
6. Under The lots loaded, type each lot or serial number, and its Cases if you want. More lines adds lines.
7. Select Release the load; or Reject it, saying why under Why; or Save, decide later to finish it later.



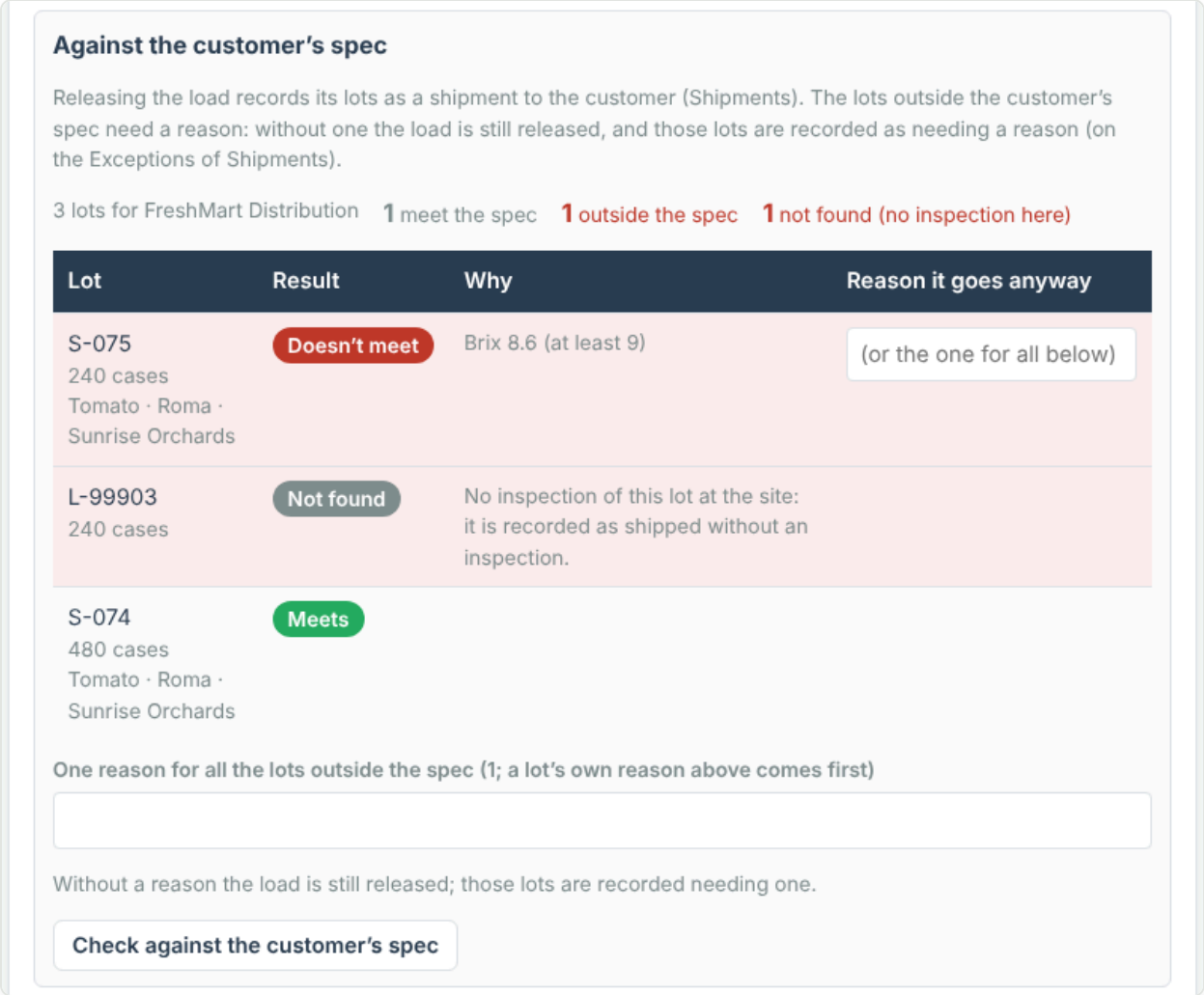
Inspecting a load

- A load is released with its customer, at least one lot and every checklist item answered.

- Without problems (nothing failed, every pulp temperature in range and as many as the Settings ask, the reefer within the Settings' tolerance of its setpoint (2 °F, or 1 °C in Canada, to start with) when both are typed, and the seal number typed), whoever inspects releases it.
- With a problem (a checklist item failed, a pulp temperature out of range, pulp temperatures missing, the reefer off its setpoint, no seal number), only a Quality Control Manager releases it, saying why under Why. Others reject it, or select Save, decide later for a Quality Control Manager to decide.
- A trailer that failed a critical item can't be released: reject it, saying why. A rejected load isn't counted as missing pulp temperatures or a seal.

> **Note:** Temperatures are typed and shown in the unit set on Cold Chain (°F or °C; without it, the site's country's: °C in Canada, °F in the United States), with one decimal (see 6.34). A pulp temperature typed with its lot is judged against the limits of the lot's commodity on Cold Chain in force on the day of the load. One without a lot, or whose lot has no inspection or whose commodity has no limits that day, is judged against the site's pulp limits in the Settings, if there are any; otherwise it isn't judged.

When the site's Shipments settings say so (they do to start with), releasing the load records its lots as a shipment to its customer (see 6.70), and the form has Against the customer's spec, below the lots. Check against the customer's spec shows how each lot stands against the spec of the customer in force on its inspection date, saving nothing: those that meet it, those outside it, those without a spec, those not found (no inspection here) and those on hold or rejected, with why. Quality Control Managers type a reason for each lot outside the spec, or One reason for all the lots outside the spec. Without a reason the load is still released, and those lots are recorded needing one, for a Quality Control Manager to give on the load's page or on the Exceptions of Shipments.



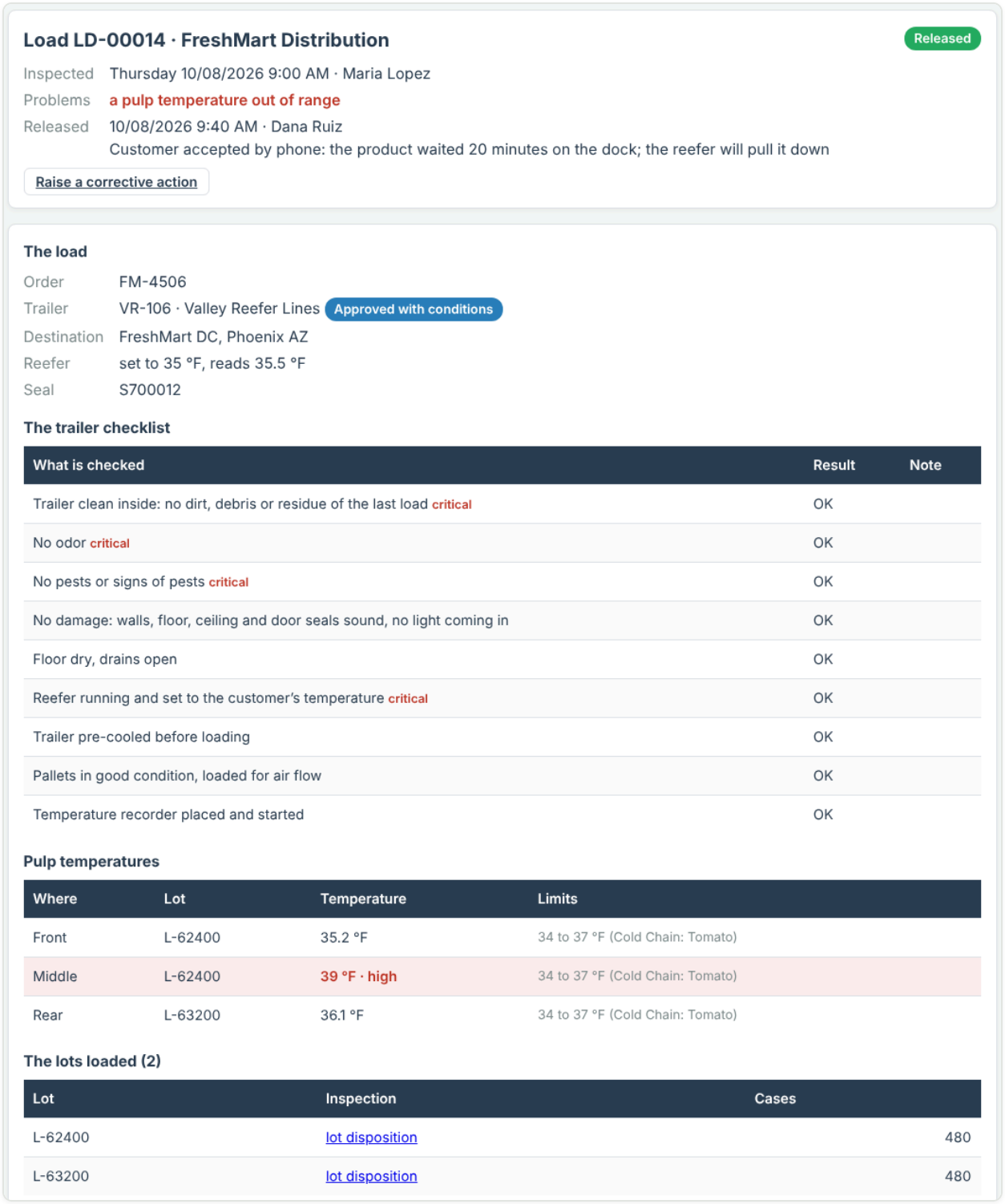
A load's lots against the customer's spec, before it is released

> **Note:** A load whose customer isn't one of the site's customers on Customer Specifications can be released, but its lots are recorded as its shipment only once the customer is added there, with Record now on the load.

A LOAD

Selecting a load opens it: when it was inspected and by whom, its problems, who released or rejected it, when and why, and its corrective action. Below are the order; the trailer and the carrier, with how the carrier stands on Approved Suppliers, such as Approved or Suspended (see 6.45), or (not on Approved Suppliers); the destination, the reefer and the seal; the trailer checklist as

answered; each pulp temperature with the limits it was judged against (Cold Chain with the commodity, or the site's), low or high in red; and the lots loaded, each linked to its inspection on Lot Disposition, or no inspection found for it.



Load LD-00014 · FreshMart Distribution Released

Inspected Thursday 10/08/2026 9:00 AM · Maria Lopez
Problems a pulp temperature out of range
Released 10/08/2026 9:40 AM · Dana Ruiz
Customer accepted by phone: the product waited 20 minutes on the dock; the reefer will pull it down

Raise a corrective action

The load

Order FM-4506
Trailer VR-106 · Valley Reefer Lines Approved with conditions
Destination FreshMart DC, Phoenix AZ
Reefer set to 35 °F, reads 35.5 °F
Seal S700012

The trailer checklist

What is checked	Result	Note
Trailer clean inside: no dirt, debris or residue of the last load critical	OK	
No odor critical	OK	
No pests or signs of pests critical	OK	
No damage: walls, floor, ceiling and door seals sound, no light coming in	OK	
Floor dry, drains open	OK	
Reefer running and set to the customer's temperature critical	OK	
Trailer pre-cooled before loading	OK	
Pallets in good condition, loaded for air flow	OK	
Temperature recorder placed and started	OK	

Pulp temperatures

Where	Lot	Temperature	Limits
Front	L-62400	35.2 °F	34 to 37 °F (Cold Chain: Tomato)
Middle	L-62400	39 °F · high	34 to 37 °F (Cold Chain: Tomato)
Rear	L-63200	36.1 °F	34 to 37 °F (Cold Chain: Tomato)

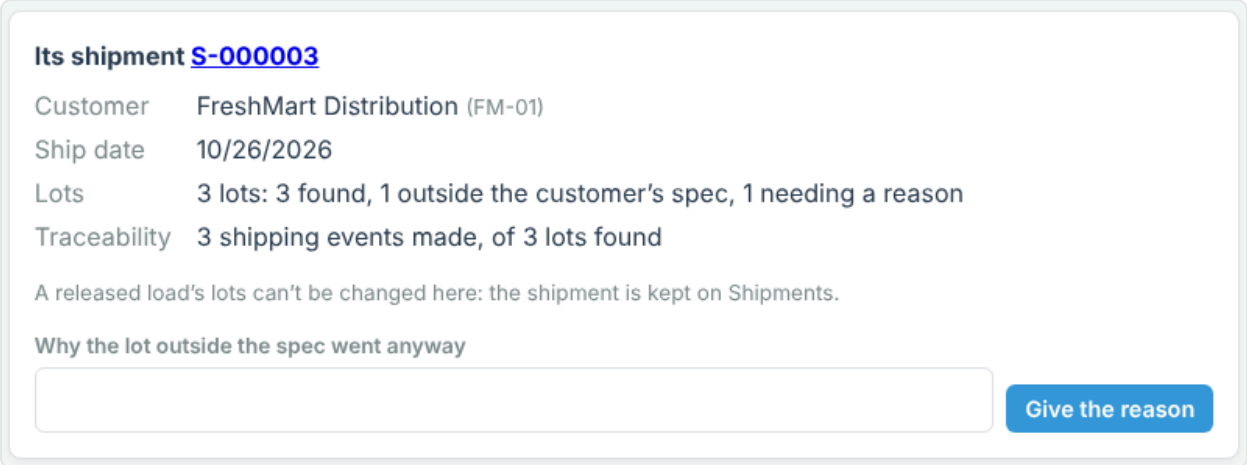
The lots loaded (2)

Lot	Inspection	Cases
L-62400	lot disposition	480
L-63200	lot disposition	480

A load released with problems

Once released or rejected, a load can no longer be changed. Add its Pictures (the trailer inside, the seal, the reefer's display, the bill of lading...), photos or PDFs, up to 8. Raise a corrective action starts one from a load rejected or released with problems (see 6.9). Cancel the load (Quality Control Managers), saying why, takes out a load recorded by mistake: it no longer counts. A load with a corrective action can't be cancelled.

A released load shows Its shipment: its number, which opens it on Shipments, the customer, the ship date, how many lots were found, outside the customer's spec and needing a reason, and how many Traceability shipping events were made. Its lots can't be changed on the load. When lots outside the spec need a reason, a Quality Control Manager types why they went anyway (Why the lot outside the spec went anyway, or Why the 2 lots ...) and selects Give the reason. Cancelling a released load voids its shipment too, with the same reason, and its Traceability shipping events: The load was cancelled: it no longer counts. Its shipment S-000003 was voided too: its lots are no longer recorded as going to the customer.



A released load's shipment

A released load whose lots aren't recorded says Its lots are not recorded as a shipment and why: for example, "Sonora Fresh Imports" is not one of the site's customers on Customer Specifications: add it there, then record the lots. It is listed on the Exceptions of Shipments. Once the customer is on Customer Specifications, a Quality Control Manager types a reason for the lots outside its spec if needed (without one they are recorded needing it) and selects Record now. A load dated more than 60 days back can't be recorded.

> **Note:** A load saved with Save, decide later is Open, and anyone who inspects loads can finish it. The Open tab lists the open loads; one still open 12 hours after it was started is late (Settings). The inspection of each lot loaded links to its loads (see A.3).

Records lists the loads of the dates chosen (the last 30 days to start with), by Result (Open, Released, Rejected, Cancelled, or Rejected or released with problems), or found by customer, carrier, trailer, order, seal or lot, to print. History lists everything done: the loads inspected, changed and cancelled, the pictures, and the changes to the checklist and the settings.

> **Note:** The Settings (Quality Control Managers) say how many pulp temperatures are read on each load (3 to start with; 0 to 10), the site's pulp limits for a lot without limits on Cold Chain (none to start with), how far the reefer can read from its setpoint (2 °F; 1 °C in Canada), after how many hours a load still open is late (12), whether a load is released with its seal number (yes), who besides the Quality Control Managers inspects loads (the Users with the Load Inspections permission), and whether Trend Alerts reports the loads rejected or released with problems and the loads left open (see 6.13).

6.45 Approved Suppliers

Growers > Approved Suppliers keeps the suppliers other than growers that the site buys from: packaging, sanitizing chemicals, pest control, laboratories, carriers and the like. Each is in a category that says which documents its suppliers must have (a letter of guarantee, a food safety certificate, a safety data sheet, a license...) and whether each expires. A Quality Control Manager approves a supplier once every one of them is there and in date, or approves it with conditions, suspends it when it fails, and reviews it again by a date. Growers are approved on Approved Growers instead (6.21), weighed on their inspections and lots.

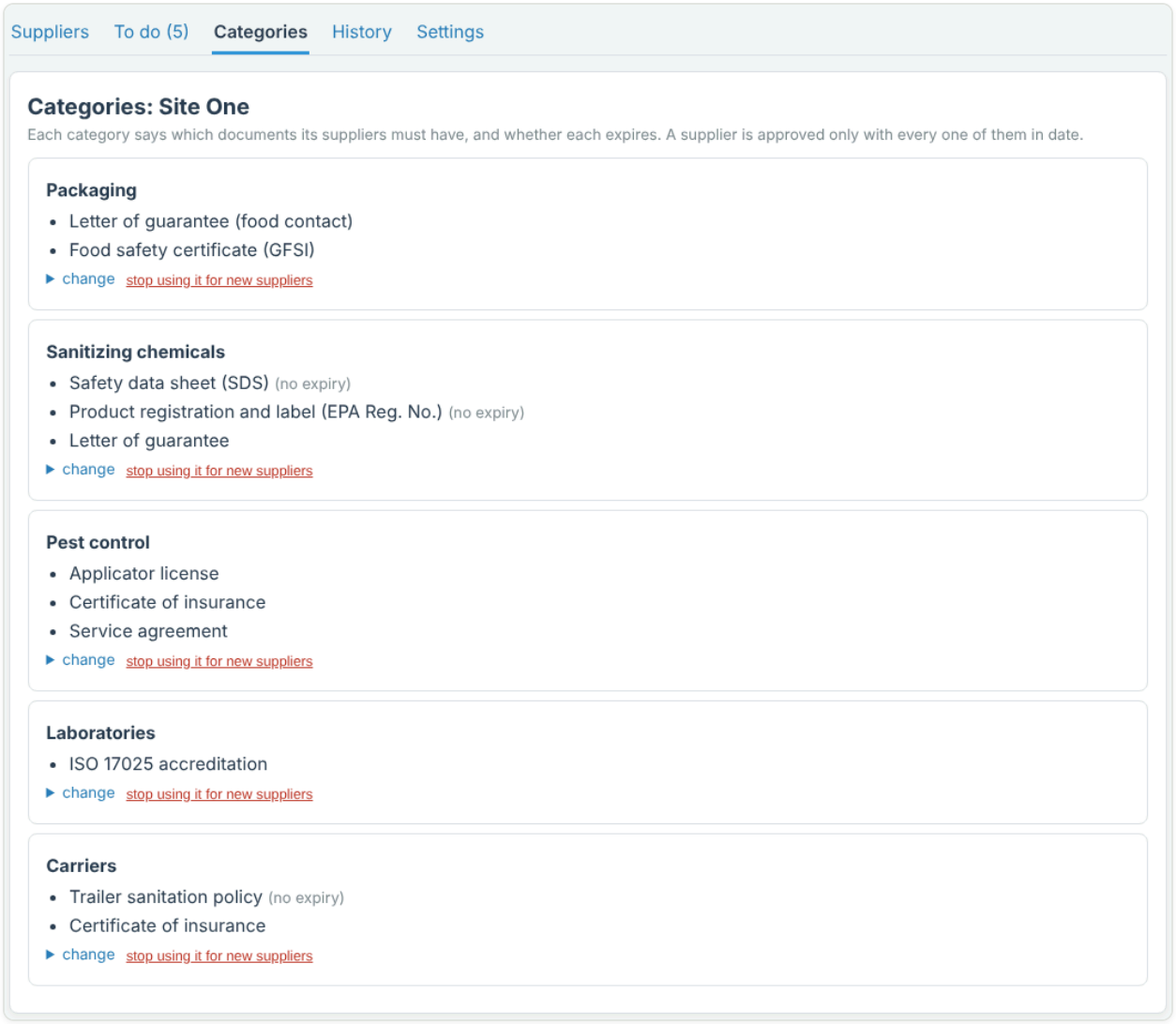
Who	What they do
Everyone with the Approved Suppliers permission	See the suppliers with their documents and reviews, the categories, To do and the history; add suppliers and their documents, and change a supplier’s details.
Quality Control Managers	Keep the categories and the settings, review the suppliers, void a document, and set a supplier aside.

CATEGORIES

Quality Control Managers set up the categories first, under Categories. At a site with none, select Start from the usual categories: five categories, each with the documents its suppliers need.

- Packaging: a letter of guarantee (food contact) and a food safety certificate (GFSI).
- Sanitizing chemicals: the safety data sheet (SDS) and the product registration and label (in the United States the EPA Reg. No.; in Canada the Health Canada authorization number, or the PCP Reg. No. or DIN of an older product), which don’t expire, and a letter of guarantee.
- Pest control: the applicator license, a certificate of insurance and the service agreement.
- Laboratories: the ISO 17025 accreditation.
- Carriers: the trailer sanitation policy, which doesn’t expire, and a certificate of insurance.

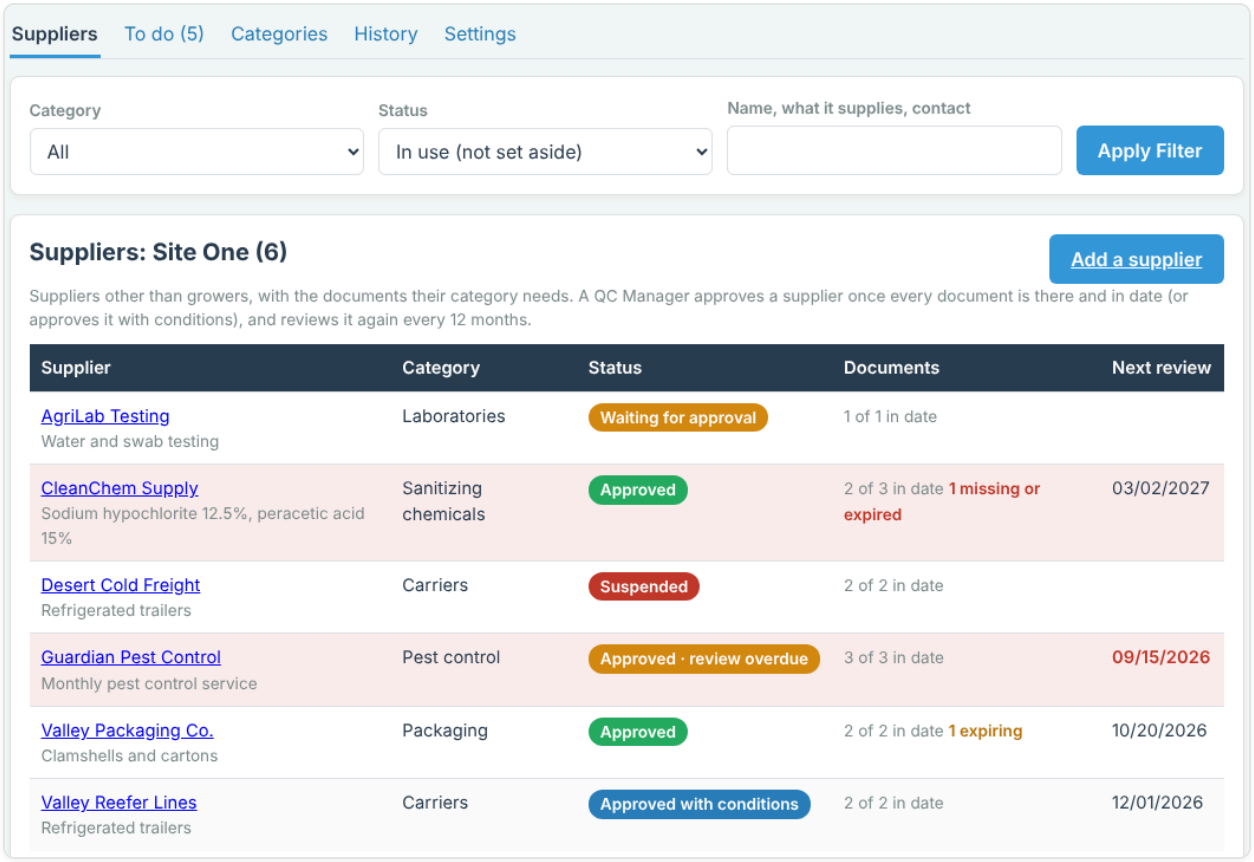
Change them to what your site asks. change on a category renames it, changes its documents (empty one and it is no longer needed) and adds up to two more at a time; untick Expires for a document that doesn’t expire. Documents the suppliers already have stay as they are. For another category, under Add a category, type its Name (Packaging, Pest control…) and the Documents its suppliers need, and select Add the category. stop using it for new suppliers takes a category off the choices for a new supplier; Use it again puts it back.



Supplier categories and the documents each needs

SUPPLIERS AND THEIR DOCUMENTS

Suppliers, where the page opens, lists the suppliers in use with their Category, their Status, how their documents stand (2 of 3 in date, 1 missing or expired, 1 expiring) and their Next review. An approved supplier with a document missing or expired, or with its review overdue, is highlighted. Choose a Category or a Status, or type part of a name, what it supplies or a contact, and select Apply Filter.



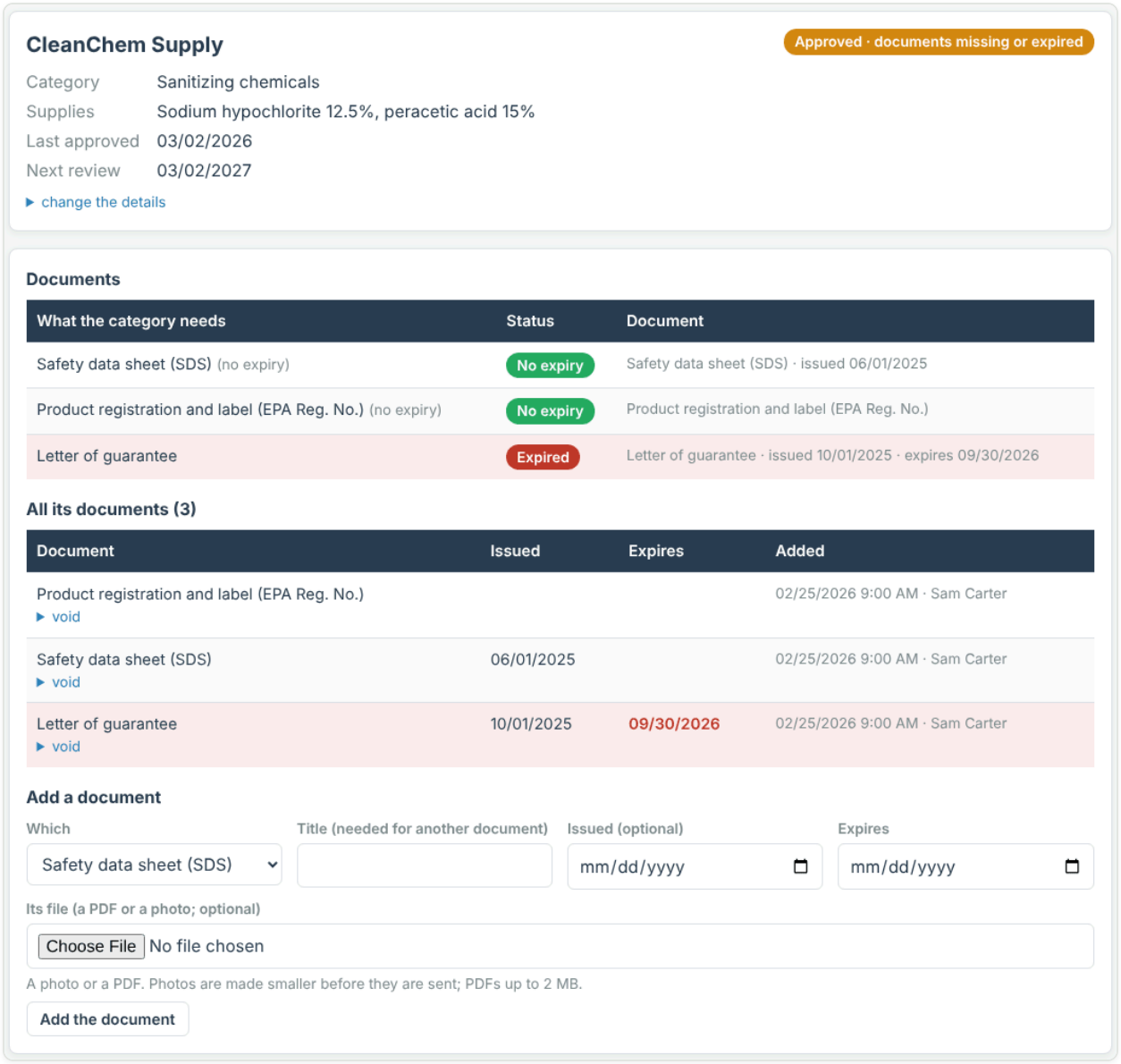
The suppliers of a site

To add a supplier:

1. Select Add a supplier.
2. Type its Name and choose its Category; type What it supplies, a Contact, the Phone, the Email and a Note if you want. Select Add the supplier: it is Waiting for approval.
3. On its page, under Add a document, choose Which document it is, of those its category needs (or Another document, and type its Title).
4. Type when it was Issued if you want, and when it Expires (needed for a document that expires). Add Its file, a PDF or a photo, if you have it.
5. Select Add the document. Add each document its category needs the same way.

Under Documents, each document the category needs shows how it stands: Missing, Expired, Expires soon (within 30 days), In date or No expiry, with the document that counts (the one in date that expires last; a document dated

anyway, for one that doesn't expire, expires on its date). Select its title to open its file. When a new certificate comes, add it: it takes over from the old one. All its documents lists every document added, voided ones too.



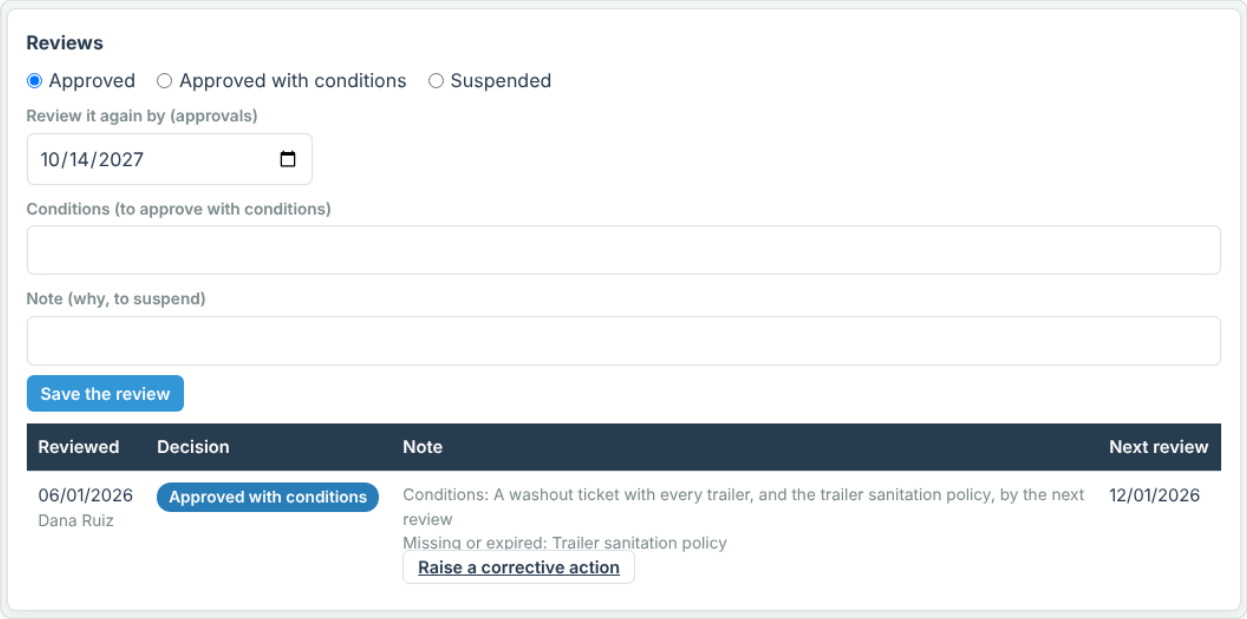
A supplier's documents, one expired

> **Note:** A Quality Control Manager can void a document added by mistake: select void under it, type Why, and select Void it. It no longer counts. change the details, below the supplier's details, changes its name, category, what it supplies, contact and note.

REVIEWING A SUPPLIER

A Quality Control Manager reviews a supplier under Reviews, on its page:

1. Choose the decision: Approved, Approved with conditions or Suspended.
2. Check Review it again by (approvals): 12 months ahead to start with; choose another date if needed, after today.
3. For Approved with conditions, type the Conditions (the GFSI certificate within 60 days...). To suspend, type why under Note (why, to suspend).
4. Select Save the review.



Reviewing a supplier approved with conditions

- Approved: only with every document its category needs there and in date (one expiring soon counts). Until then the page lists what is missing or expired, and the supplier can be approved only with conditions.
- Approved with conditions: what the supplier must do, shown on its page; the review keeps the documents missing or expired at the time.
- Suspended: don’t buy from the supplier until it is approved again. A suspended supplier has no review date.

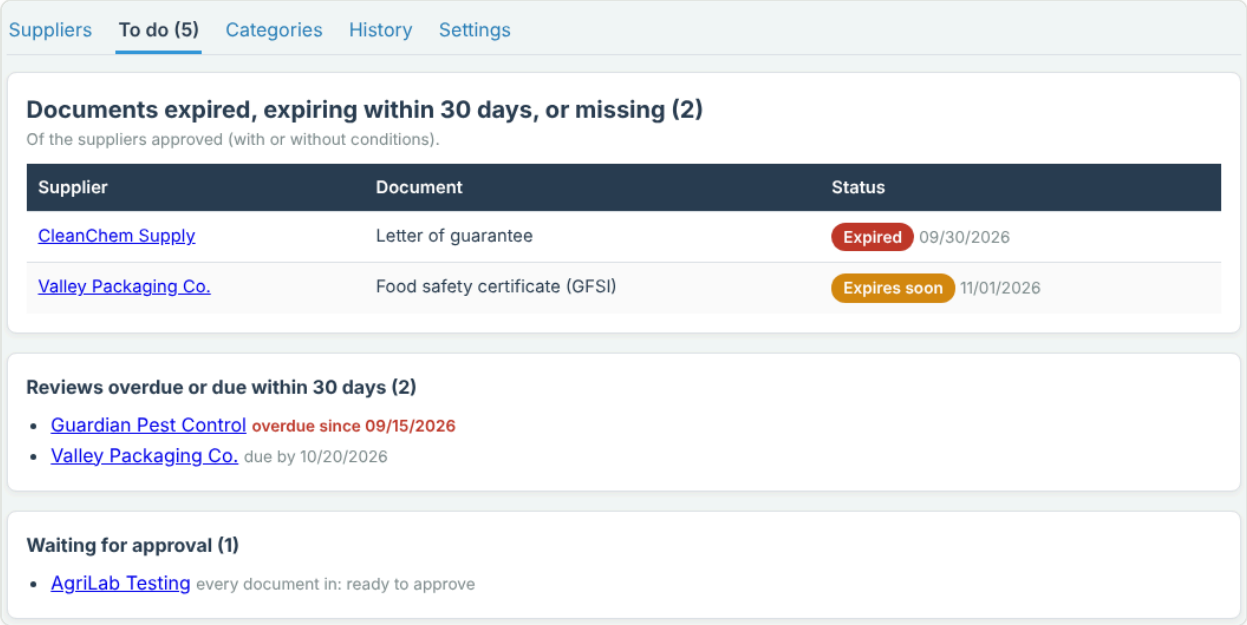
To review an approval that stays as it is, record the same decision again with a new date. Every review is listed under Reviews, with who and when, the

conditions, what was missing and why. Raise a corrective action, on a review that approved with conditions or suspended, starts one from it (see 6.9).

> **Note:** No longer used (set it aside), for a supplier the site no longer buys from (Quality Control Managers): type Why and select Set it aside. It is kept with its documents and reviews, but no longer counted, listed as in use or offered on Wash Water and Load Inspections. Use it again puts it back, waiting for approval.

TO DO

To do, with how many on the tab, lists the documents expired, expiring within 30 days or missing at the suppliers approved (with or without conditions); the reviews overdue or due within 30 days; and the suppliers waiting for approval, with what each lacks (or every document in: ready to approve). Select a supplier to open it. Trend Alerts reports the documents and the reviews overdue every day (see 6.13).



What is to do

Where a supplier is used, it shows how it stands (Approved, Approved with conditions, Waiting for approval, Suspended; or, in orange, Approved · review overdue or Approved · documents missing or expired):

- On Wash Water (6.43), choose the supplier of a wash point's sanitizer under Its supplier (Approved Suppliers; optional) when adding or changing the wash point. Wash points then shows it, such as Supplier: CleanChem Supply Approved · documents missing or expired.
- On Load Inspections (6.44), the Carrier list offers the suppliers on Approved Suppliers first. A load's page shows how its carrier stands after the trailer, such as VR-106 · Valley Reefer Lines Approved with conditions, or (not on Approved Suppliers) when no supplier has that name.

History lists everything done at the site: the settings, the categories, the suppliers added and changed, the documents added and voided, the reviews and the corrective actions raised; a supplier's page has its own History. The Audit Pack (6.17) has a section with the suppliers and the reviews of the period.

> **Note:** The Settings (Quality Control Managers) say how often approvals are reviewed again (every 12 months to start with, from 1 to 60; the next date can be changed at each review), when a document or review is due soon (within 30 days; 0 to 180), and whether Trend Alerts reports the documents expired, expiring or missing and the reviews overdue (see 6.13).

6.46 Metal Detection

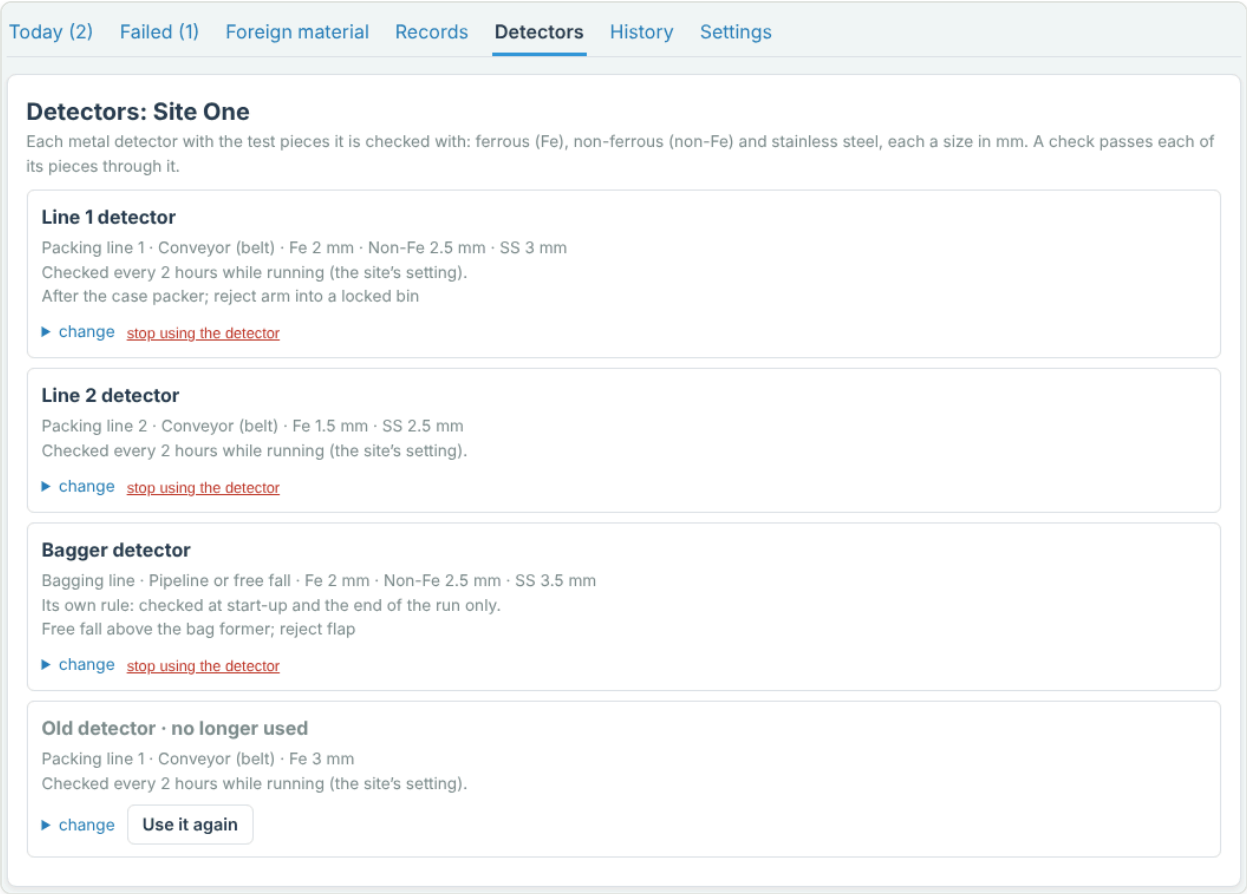
Packing house > Metal Detection checks the metal detectors of the packing house (on a packing line, a conveyor, a bagger's free fall) with their test pieces: a ferrous (Fe), a non-ferrous (non-Fe) and a stainless steel piece, each a size in mm. Each detector in use has a start-up check every production day, then a check every hour or so while the lines run, and one after a change or a repair: each test piece passed through in the product must be detected and rejected, and the reject device must work, its bin locked. A failed check records what was done with the product packed since the last passed check, and the detector is fixed and tested again. The foreign material the detectors find in the product is recorded too.

Who	What they do
Everyone with the Metal Detection permission	See the detectors, the checks, the foreign material found, the records and the history.
Quality Control Managers, and the Users chosen in the Settings	Record the checks, test a detector again once it is fixed, mark a detector not running, and record the foreign material found.
Quality Control Managers	Keep the detectors and the settings, close a failed check without testing again, and void foreign material recorded by mistake.

DETECTORS

Quality Control Managers list the detectors under Detectors:

1. Under Add a detector, type its Name (Line 1 detector, Bagger detector…) and the Line or place if you want, and choose its Kind (Conveyor (belt), Pipeline or free fall, or Other).
2. Type the size in mm of each test piece it is checked with: Fe (ferrous) test piece, Non-Fe (non-ferrous) test piece and Stainless steel test piece (more than 0 and up to 20 mm, one decimal). Leave a piece empty when the detector isn’t checked with it: at least one is needed.
3. If the detector is checked on its own rule, type it under Its own rule: check every (hours; 0: at start-up and the end of the run only; empty: the site’s setting). Type a Description if you want (the reject device, where the test pieces are kept…), and select Add the detector.

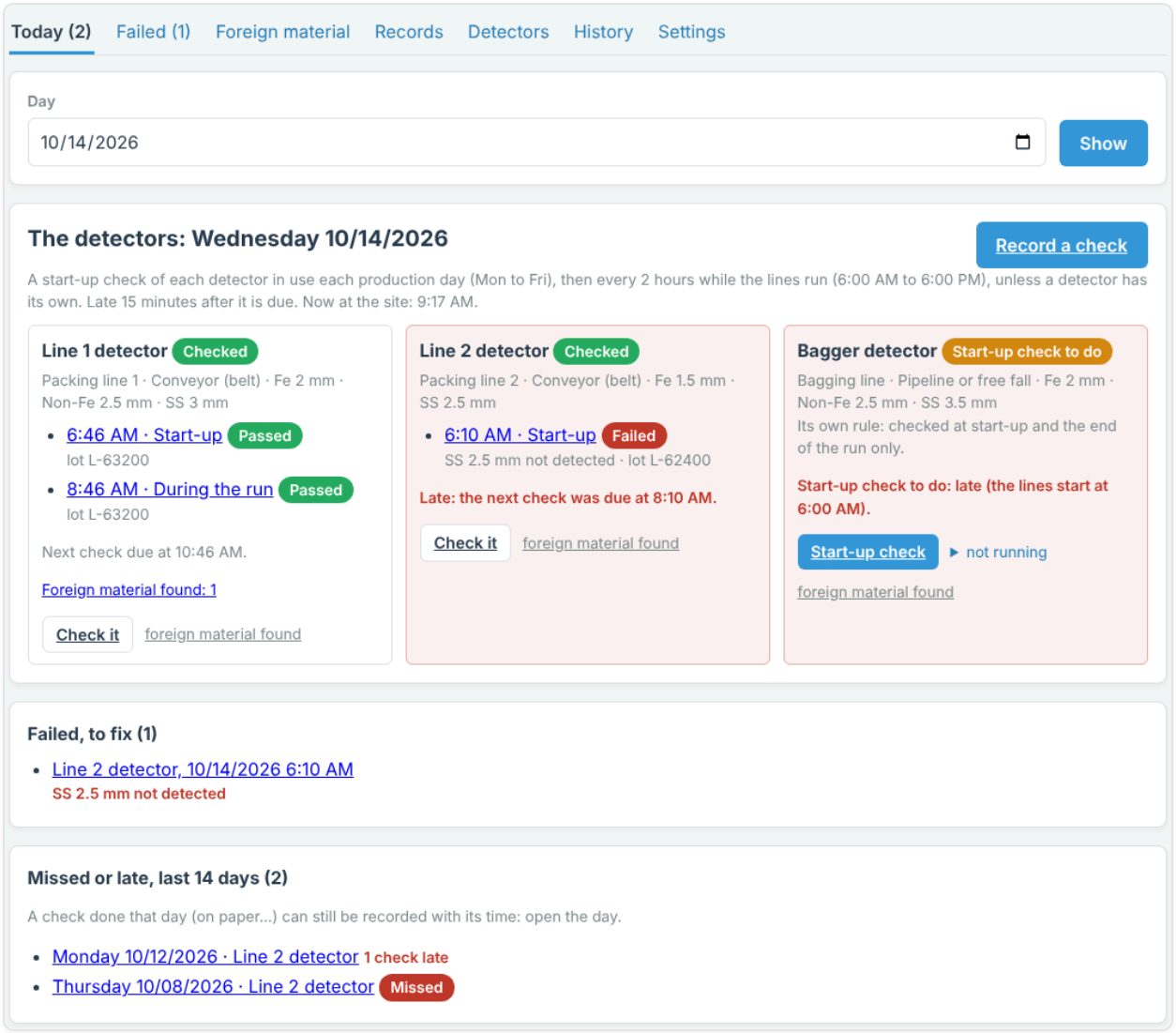


The detectors and their test pieces

A detector added has its start-up check due from today; a site has up to 50, those no longer used included. change on a detector changes its name, line, kind, test pieces or rule (select Save): checks already recorded keep the test pieces they had. stop using the detector, for one no longer used, takes off its start-up check of today still to do, and nothing is due for it until Use it again.

TODAY

Today, where the page opens, shows each detector in use with its checks of the day and when the next is due: a start-up check each production day (Monday to Friday to start with), then a check every hour while the lines run (from 6:00 AM to 6:00 PM to start with; Settings), unless the detector has its own rule. What is late shows in red: a start-up check not done 15 minutes after the lines start, a check more than its interval and 15 minutes after the last, or a failed check. Below the detectors, the failed checks to fix and the days missed or with checks late in the last 14 days. Choose a Day to see another.



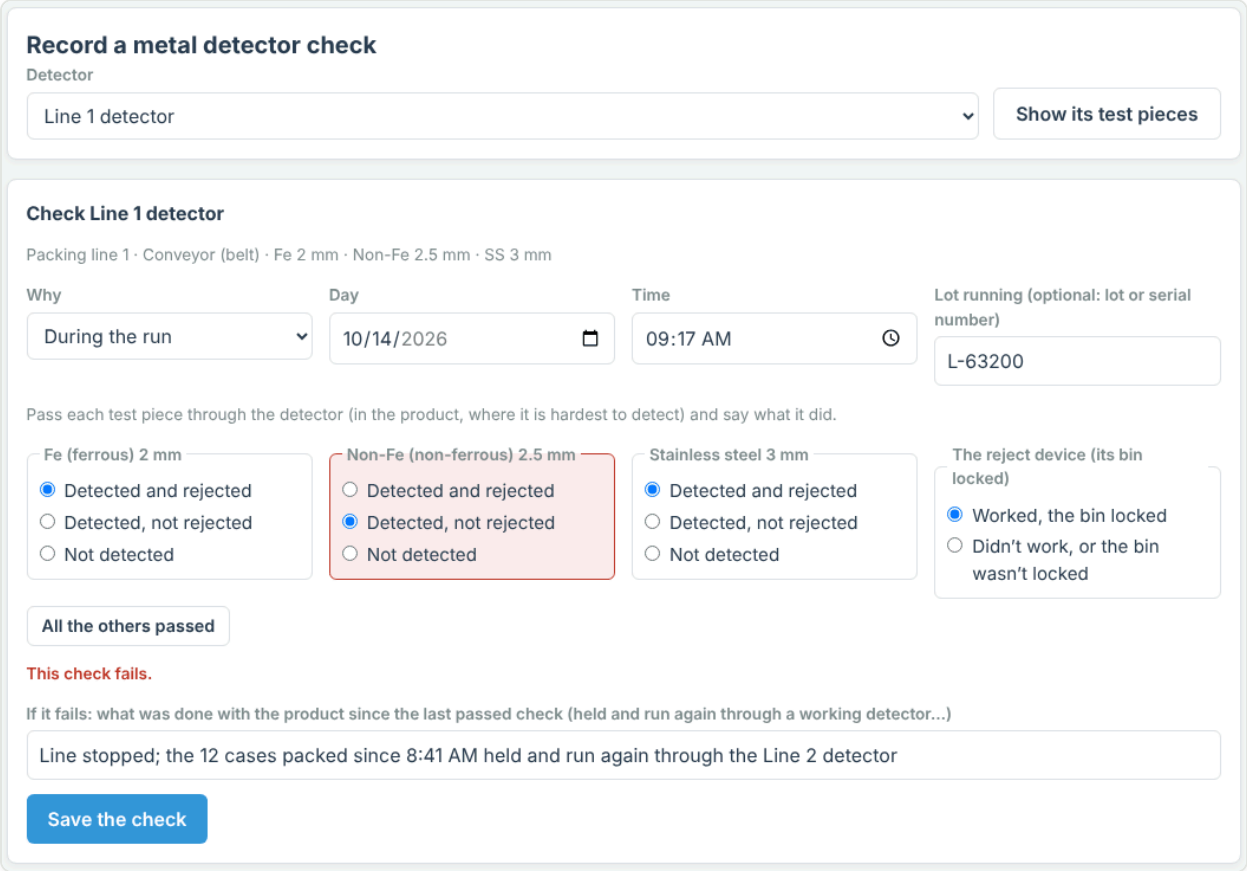
The detectors of the day

To check a metal detector:

1. Select Start-up check or Check it on the detector (or Record a check, choose the Detector and select Show its test pieces): its test pieces show, each with its size.
2. Check Why (Start-up, During the run, After a change or a repair, Other (after a stop...), or End of the run (the line stops): nothing is due after it), the Day and Time (now; or the time it was done, up to 14 days back, for a check done on paper), and type the Lot running if you want (a lot or serial number: the check is linked to that lot's inspection).
3. Pass each test piece through the detector, in the product where it is hardest to detect, and choose what it did: Detected and rejected, Detected, not rejected,

or Not detected. Under The reject device (its bin locked), choose Worked, the bin locked or Didn't work, or the bin wasn't locked. All the others passed answers the rest as passed. A piece not detected or not rejected, or the reject device not working, is marked as you choose it, and This check fails shows.

4. If the check fails, type what was done with the product since the last passed check (held and run again through a working detector...).
5. Select Save the check.



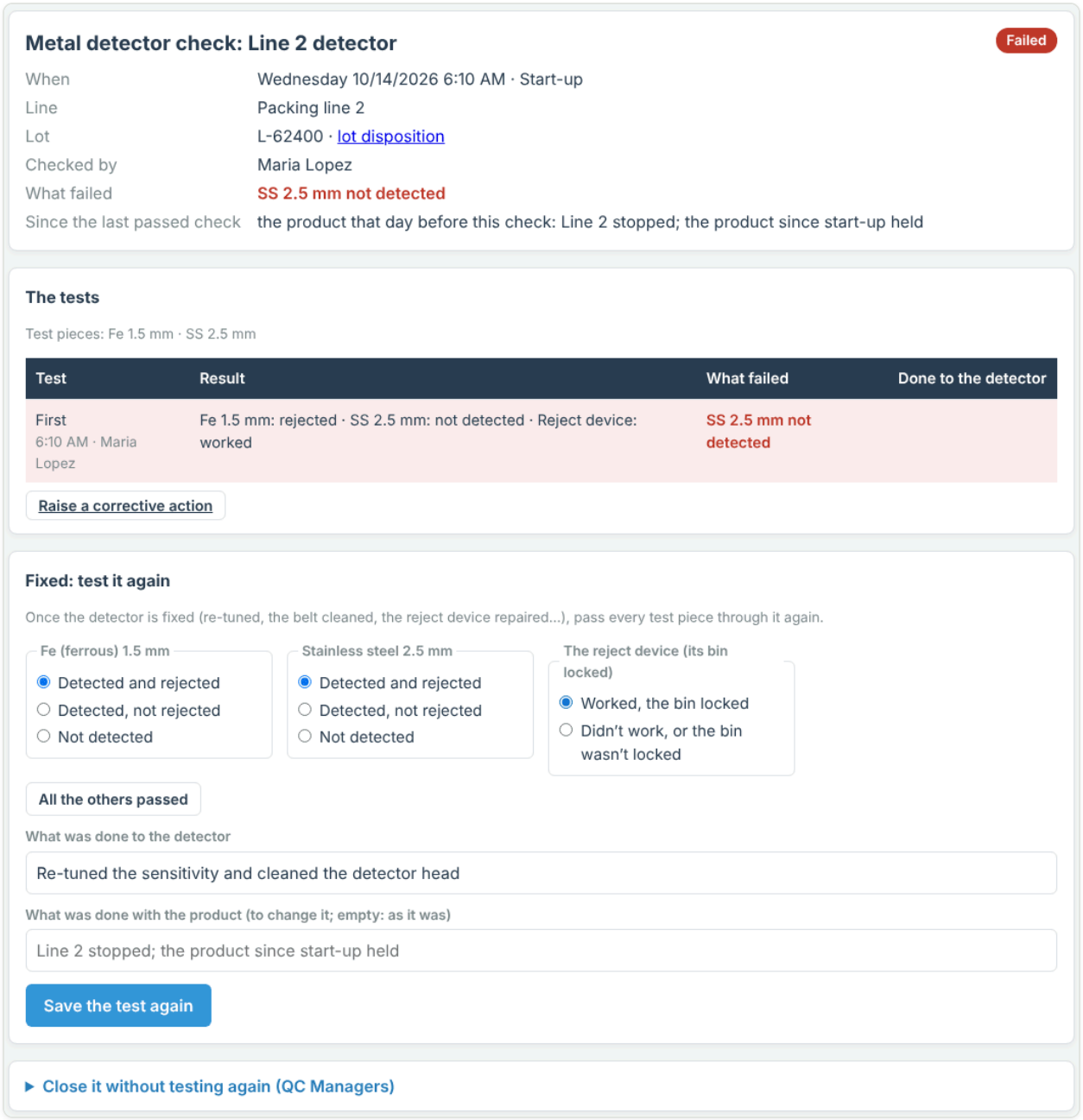
Checking a metal detector with its test pieces

not running, on a detector with no check that day, with why if you want, marks it not running that day: nothing is due for it. It was running after all puts its start-up check back.

FAILED CHECKS

- Every test piece detected and rejected, and the reject device working: Passed.

- Anything else: Failed. Fix the detector (re-tuned, the belt cleaned, the reject device repaired…); then, under Fixed: test it again, pass every test piece through it again, type What was done to the detector, and select Save the test again. Test it again as many times as needed: the check is Fixed (passed again) when every piece passes.
- Close it without testing again (Quality Control Managers): when the detector can’t be tested again (it was replaced, the line stopped for the day…), saying why. A failed check more than 14 days back can no longer be tested again, only closed.



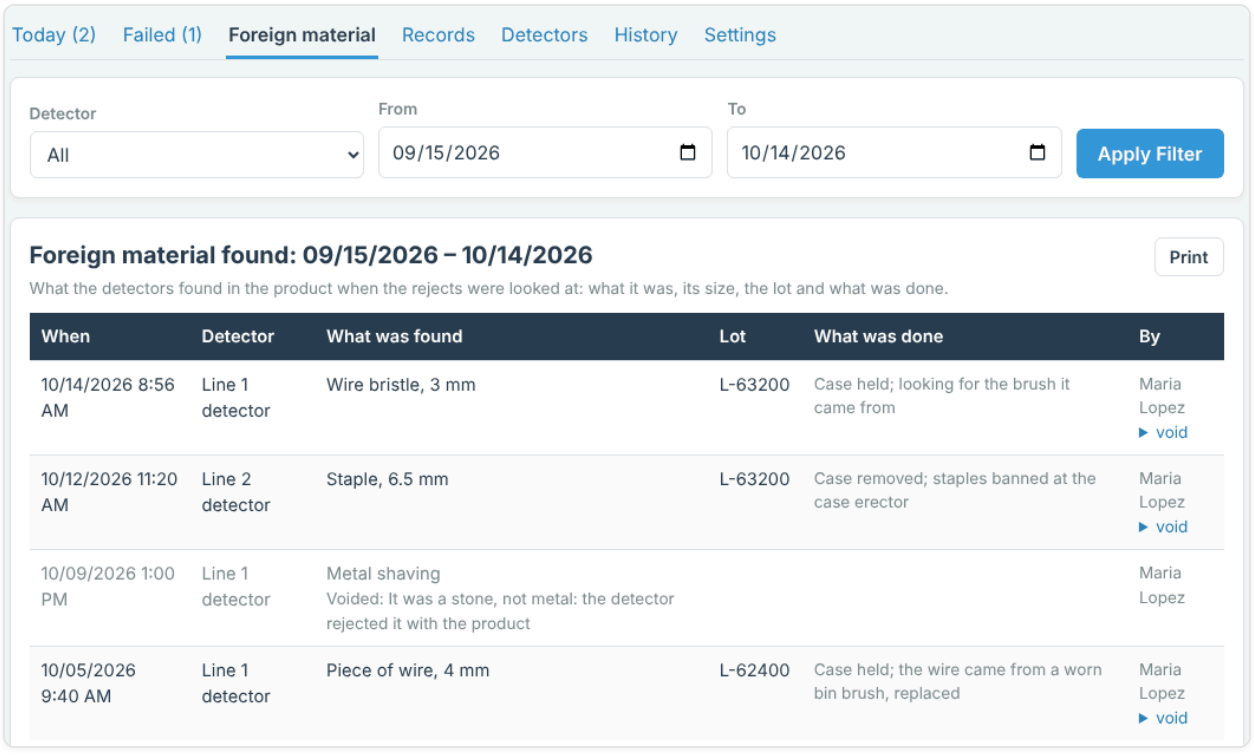
A failed check, to test again after fixing the detector

A check shows when it was done, the line, the lot (with a link to its lot disposition), who checked, what failed and what was done with the product since the last passed check, then The tests: the first and each one after fixing the detector, with who, when and what was done to the detector. When testing again, type What was done with the product only to change it. Raise a corrective action starts one from a failed check (see 6.9). The inspection of the lot links to its detector checks, with a warning while a failed check with it isn't fixed.

> **Note:** A start-up check not recorded by the end of its day is missed. One that was done (on paper, say) can still be recorded in the next 14 days, with its day and time: open the day under Missed or late, on Today. Failed lists the failed checks still to fix and those fixed or closed in the last 30 days.

FOREIGN MATERIAL FOUND

When the rejects are looked at and a detector has found metal in the product, select foreign material found on the detector, on Today, or use Record foreign material found under Foreign material: check the Detector, the Day and Time (up to 14 days back), type the Lot if you want, What was found (a piece of wire, a staple...), Its size in mm if you want and What was done (the product held, the source looked for...), and select Record it. Foreign material lists what was found in the dates chosen, for a Detector or All, to print. There a Quality Control Manager voids a record made by mistake (void, saying why, then Void it): it no longer counts.



The foreign material the detectors found

Records lists the Metal detector checks or The detectors' days (the start-up check done, missed or not running, and the checks late) of the dates chosen, for a Detector or All, and the Checks All or Failed only, to print. History lists everything done, including what Continuum QC marked missed.

> **Note:** The Settings (Quality Control Managers) say the Production days, how often a detector is checked while a line runs (every hour to start with; up to every 12 hours; 0: only at start-up and the end of the run; a detector can have its own rule), when the lines start and stop (6:00 AM and 6:00 PM), when a check is late (15 minutes), who besides the Quality Control Managers checks the detectors (the Users with the Metal Detection permission), whether metal detector checks are paused (no production, out of season: no check is due, and today's start-up checks still to do are taken off), and whether Trend Alerts reports the failed checks and the start-up checks missed and checks late (see 6.13).

IN THE FOOD SAFETY APP

Checks and foreign material can also be recorded in the Food Safety app (see 6.71). Its Metal detector check lists each detector with why, the lot, each test piece (Detected and rejected, Yes or No, and if not, how) and the reject device; a finished run is a check, or, when the detector's last check failed (up to 14 days back), its test again. Its Foreign material found records what was found, its size, the lot and what was done. Only Quality Control Managers and the Users ticked under Who checks the detectors, besides the QC Managers in the Settings can record them: tick the inspectors who use the app.

In the add and change forms of a detector, Location in the Food Safety app and Area in the Food Safety app say where the app lists it, for both logs (see 6.72).

6.47 Net Weight Checks

Packing house > Net Weight Checks checks that the packs packed by weight (a 2 lb bag, a 25 lb carton, a 1 kg clamshell, a 10 oz pint) hold what their label says.

Each pack has its declared net weight (the label's), its tare (the empty bag, carton or liner) and the lowest net weight any one package may have: by default the declared weight less the legal tolerance of the site's country (in the United States the maximum allowable variation (MAV) of NIST Handbook 133, Table 2-5; in Canada the tolerance of the Safe Food for Canadians Regulations (SFCR), Schedule 4, Table 3), or a lowest weight set for the pack, never below the legal one, such as a customer's spec. A check weighs a sample of packages of a pack, as the scale shows them, and takes the tare off each: it passes when their average net weight is at least the declared weight and no package is below the lowest allowed. A failed check records what was done with the product, and the pack is checked again. Each check also shows the give-away: how much the average is over the declared weight.

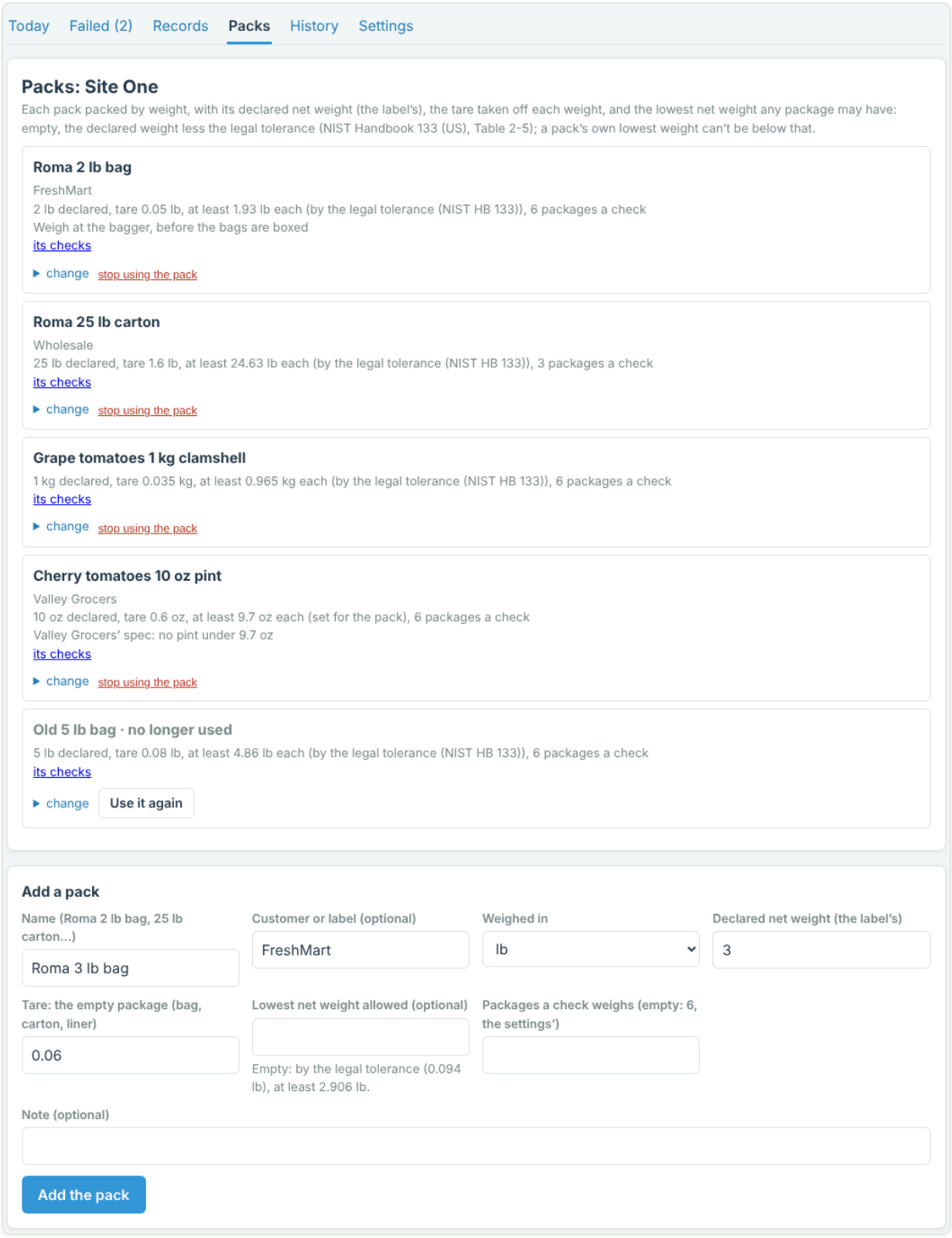
> **Note:** The country is set for each site in QA Setup (6.32). The legal lowest of a 2 lb bag is 1.93 lb in the United States; of a 1 kg bag, 965 g in the United States and 985 g in Canada; of a 2 kg bag, 1946 g and 1970 g. In Canada a pack declares its net quantity in metric units (g or kg). Each check keeps the rule it was judged by: its page says Legal tolerance: NIST Handbook 133 (US), Table 2-5, or SFCR (Canada), Schedule 4, Table 3, and so does its line in History. A check is always judged by at least the legal lowest (rounded up to 3 decimals): a pack's own lowest weight only raises it, and one below the legal lowest is flagged on Packs.

Who	What they do
Everyone with the Net Weight Checks permission	Record the checks, check a pack again after a failed check, and see the packs, the checks, the records and the history.
Quality Control Managers	Keep the packs and the settings, close a failed check without checking again, and void a check recorded by mistake.

PACKS

Quality Control Managers list the packs under Packs:

1. Under Add a pack, type its Name (Roma 2 lb bag, 25 lb carton…) and the Customer or label if you want, and choose what it is Weighed in: lb, oz, kg or g (at a site in Canada, g or kg: a pack already in lb or oz there says “Canada: declare the net quantity in metric units (g or kg).” until it is changed).
2. Type the Declared net weight (the label’s) and the Tare: the empty package (bag, carton, liner), in that unit. Under Lowest net weight allowed, the page shows the legal tolerance and the lowest weight it gives as you type the declared weight; leave it empty to use it, or type the lowest weight a customer allows (not above the declared weight, nor below the legal lowest).
3. Type how many Packages a check weighs if the pack isn’t weighed like the others (empty: the Settings’), and a Note if you want (where to weigh it, a customer’s spec…), then select Add the pack.



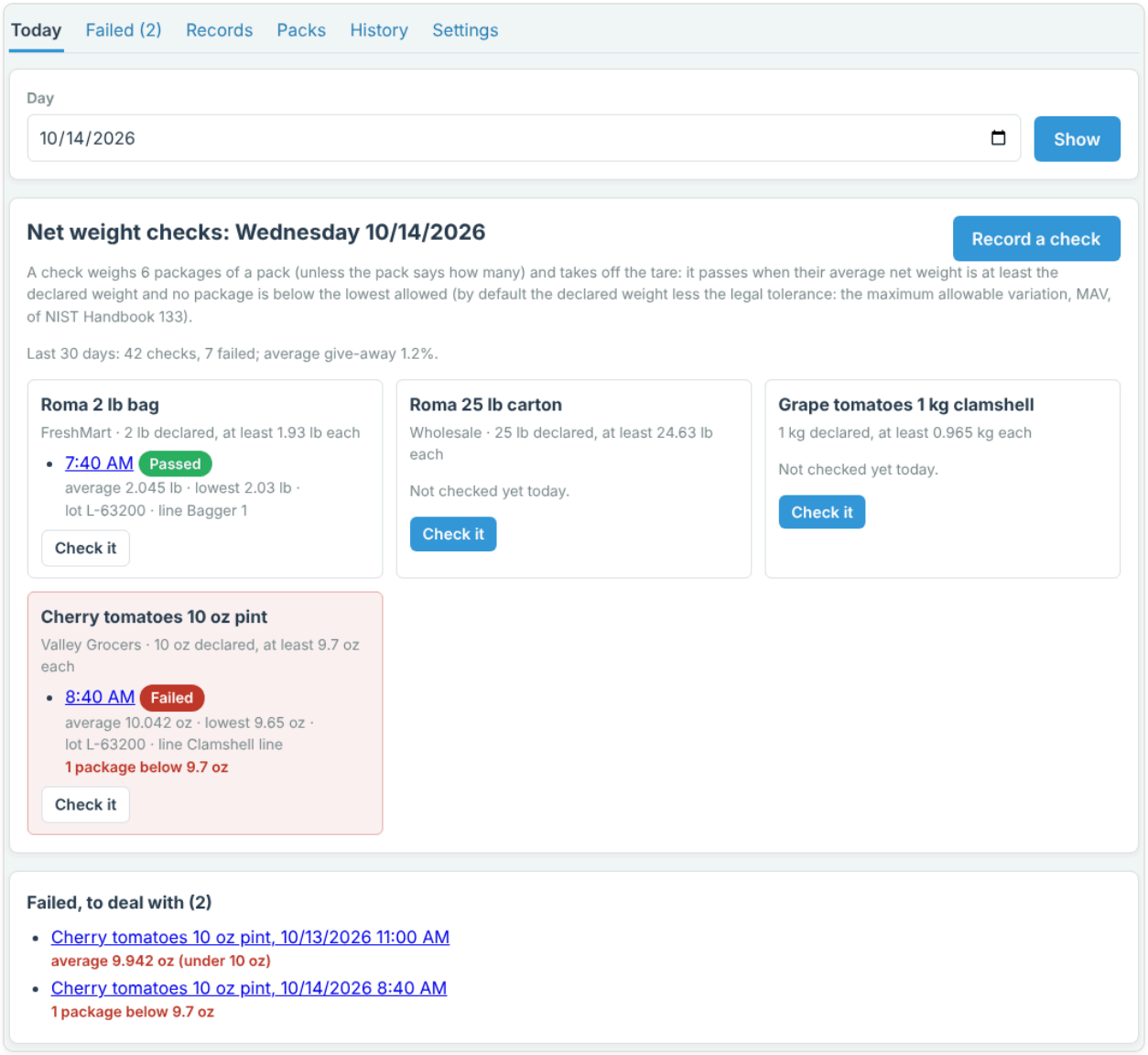
The packs, and a new one typed in

A site has up to 200 packs, those no longer used included, each with its own name. change on a pack changes its name, customer, unit, weights, sample or

note (select Save): checks already recorded keep the weights they were judged against. its checks opens the pack's records. stop using the pack, for one no longer packed, asks first, then takes it off Today and the check form; its checks stay. Use it again puts it back.

TODAY

Today, where the page opens, shows each pack in use with the day's checks: the time, Passed or Failed, the average and lowest net weight, the lot and line, and why a check failed, in red. Below the packs, the failed checks still to deal with. A line says the last 30 days' checks, those failed and the average give-away. Choose a Day to see another.



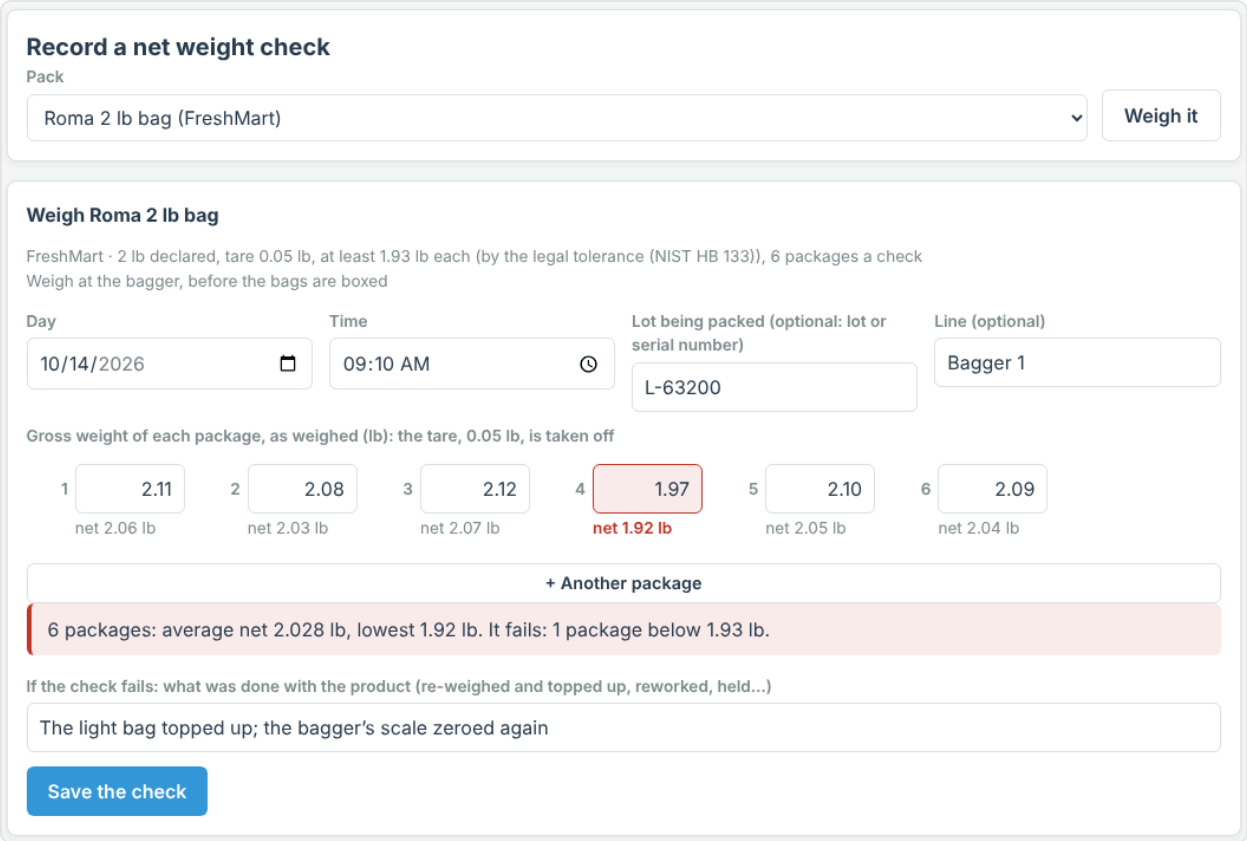
The day's net weight checks

To check a pack:

1. Select Check it on the pack (or Record a check, choose the Pack and select Weigh it): the pack's weights show, with a box for each package of the sample.
2. Check the Day and Time (now; or the time it was done, up to 14 days back, for a check done on paper), and type the Lot being packed (a lot or serial number: the check is linked to that lot's inspection) and the Line if you want; the lines typed before are offered.
3. Weigh each package as it is packed, on a scale zeroed with nothing on it, and type its gross weight in its box, as the scale shows it: the page takes the tare

off and shows the net weight under the box, in red when it is below the lowest allowed. + Another package adds a box (up to 50).

4. As you type, the page sums up the check: how many packages, the average and lowest net weight, and whether it passes or fails and why, or how many packages are still to weigh.
5. If the check fails, type what was done with the product (re-weighed and topped up, reworked, held...).
6. Select Save the check.

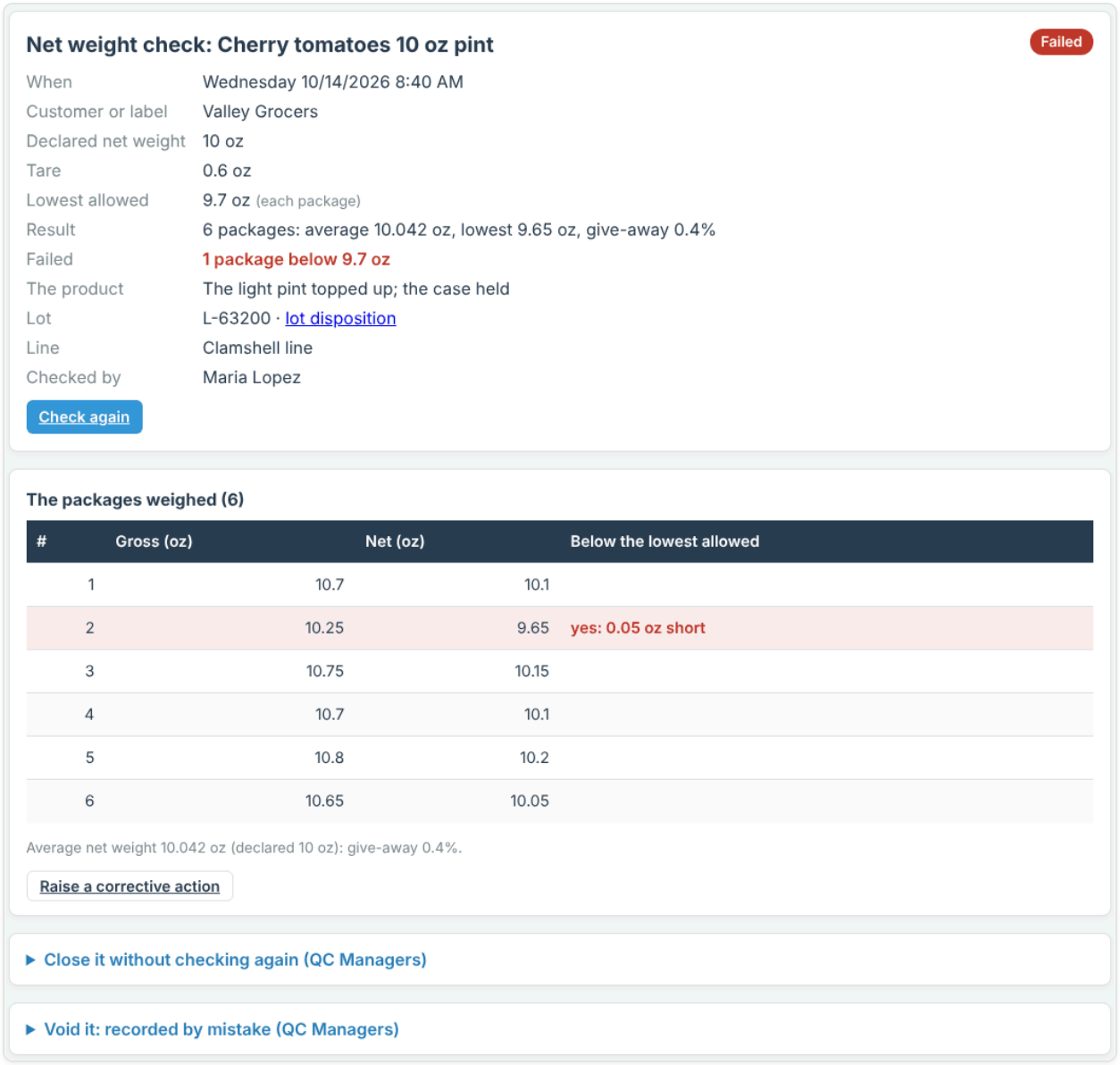


Weighing a pack: one bag is below the lowest allowed

Note: A check needs at least as many packages as the pack's sample. A weight that isn't a number (up to 3 decimals), or a package lighter than the empty package (the tare), isn't saved: weigh it again.

FAILED CHECKS

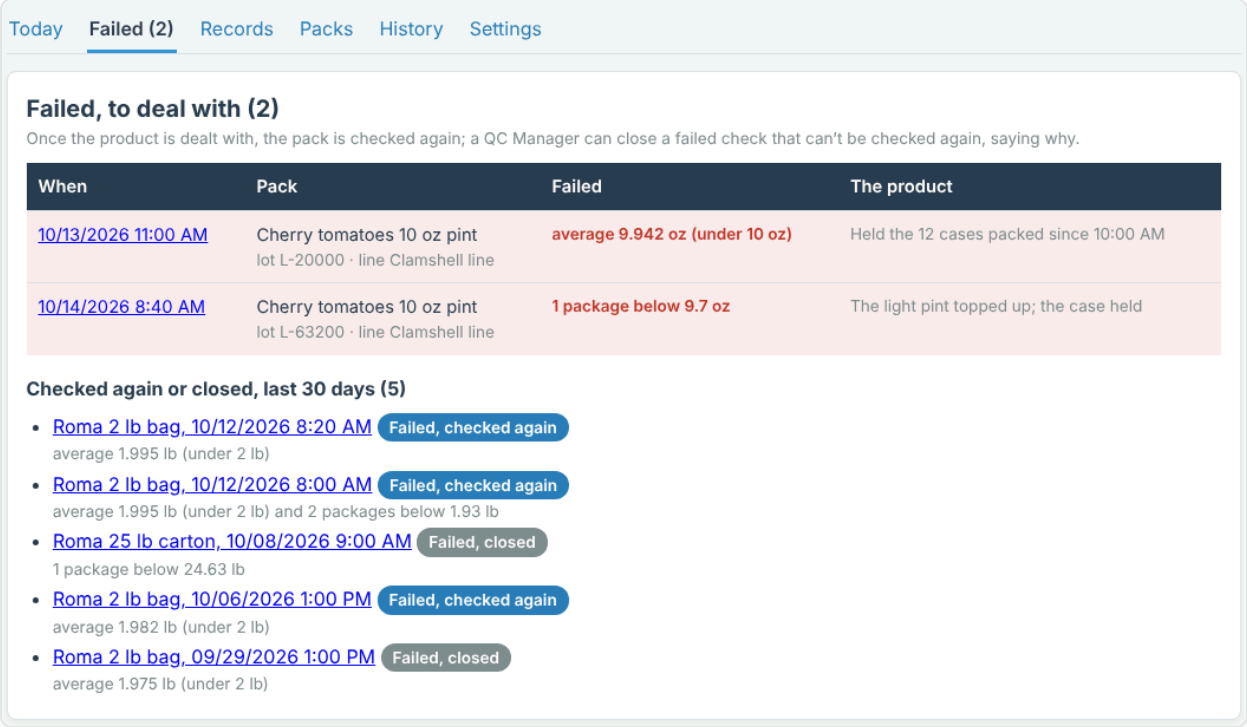
- The average net weight at least the declared weight, and no package below the lowest allowed: Passed.
- Anything else: Failed, with why: the average under the declared weight, or packages below the lowest allowed, or both. Deal with the product (re-weigh and top up the light packages, rework, hold…), then select Check again on the check: the form is filled in with the same pack, lot and line (the new check can’t be earlier than the failed one). Once that check is saved, the failed one is Failed, checked again and links to it, whatever the new check shows; if it fails too, it is the one to deal with.
- Close it without checking again (Quality Control Managers): when the pack can’t be checked again (the lot was reworked and shipped, the run ended…), saying Why, then Close it.



A failed check, with the package below the lowest allowed

A check shows when it was done, the customer, the declared weight, the tare, the lowest allowed, the result (the packages, the average, the lowest and the give-away), why it failed, what was done with the product, the lot (with a link to its lot disposition), the line and who checked, then The packages weighed: each one's gross and net weight, those below the lowest allowed in red, with how much short. Raise a corrective action starts one from a failed check (see 6.9). Void it: recorded by mistake (Quality Control Managers) voids a check without a corrective action, saying why: it no longer counts, and a failed check it checked again is to deal with again. The inspection of the lot links to its net weight checks, with a warning while a failed check with it isn't dealt with.

Failed lists the failed checks to deal with, with the pack, the lot and line, why each failed and what was done with the product, and those checked again or closed in the last 30 days.



The failed checks

Records lists the checks of the dates chosen (the last 30 days to start with), for a Pack or All, and a Result (All, Passed, Failed, Failed, to deal with, or Voided), to print; from an inspection, a lot's checks. History lists everything done.

> **Note:** The Settings (Quality Control Managers) say how many packages a check weighs for a pack that doesn't say (10 to start with; 1 to 50), and whether Trend Alerts reports the checks failed in the last 14 days and those not dealt with yet (see 6.13).

6.48 Glass and Brittle Plastics

Packing house > Glass and Brittle Plastics keeps the register of the glass and brittle plastic items in each area of the packing house (light covers, scale displays, clocks, gauges, windows, hard plastic bins...): what each is, its material, how

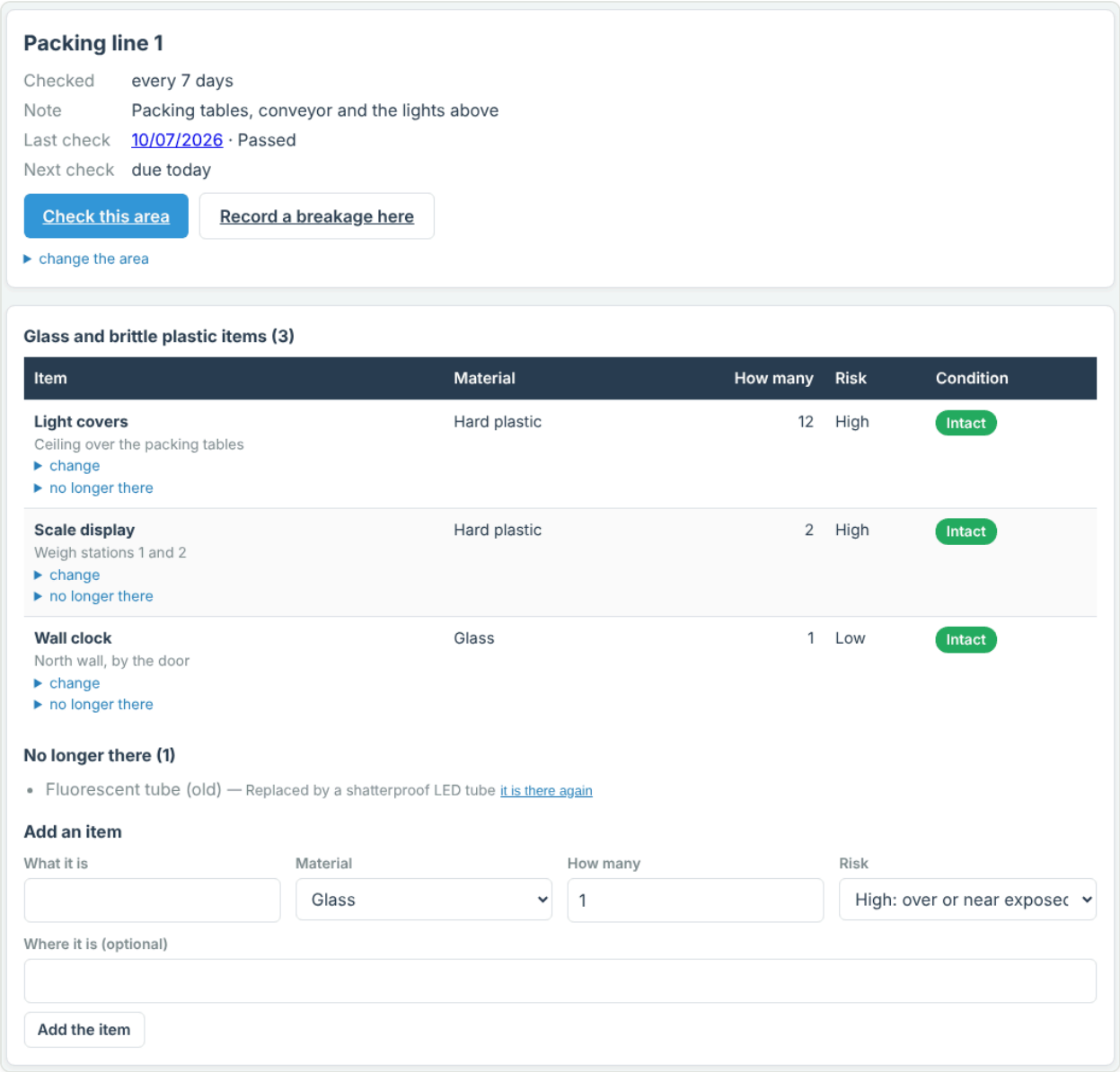
many, where it is and its risk (high: over or near exposed product). Each area is checked every so many days: each of its items intact, damaged, missing or no longer there. When something breaks, the breakage is recorded with the product exposed and what was done with it, the area is cleaned up, and a Quality Control Manager clears it before production resumes.

Who	What they do
Everyone with the Glass and Brittle Plastics permission	Check the areas, record breakages and their cleanup, add photos, record an item repaired or replaced, and see the register, the checks, the breakages and the history.
Quality Control Managers	Keep the register (the areas and their items) and the settings, clear the area after a breakage, cancel a breakage and void a check recorded by mistake.

THE REGISTER

Quality Control Managers list the areas and their items under Register:

1. Under Add an area, type its Name (Packing line 1, Cooler 2, Receiving dock…), how often it is Checked every (days) (the Settings' to start with) and a Note if you want (what it covers), then select Add the area. The area opens.
2. Under Add an item, type What it is (the usual items are offered as you type: light covers, scale display, wall clock…), and choose its Material (Glass, Hard plastic, Acrylic, Ceramic or Other).
3. Type How many there are, choose the Risk (High: over or near exposed product, or Low) and type Where it is if you want (ceiling over the packing tables, weigh station 2…), then select Add the item.

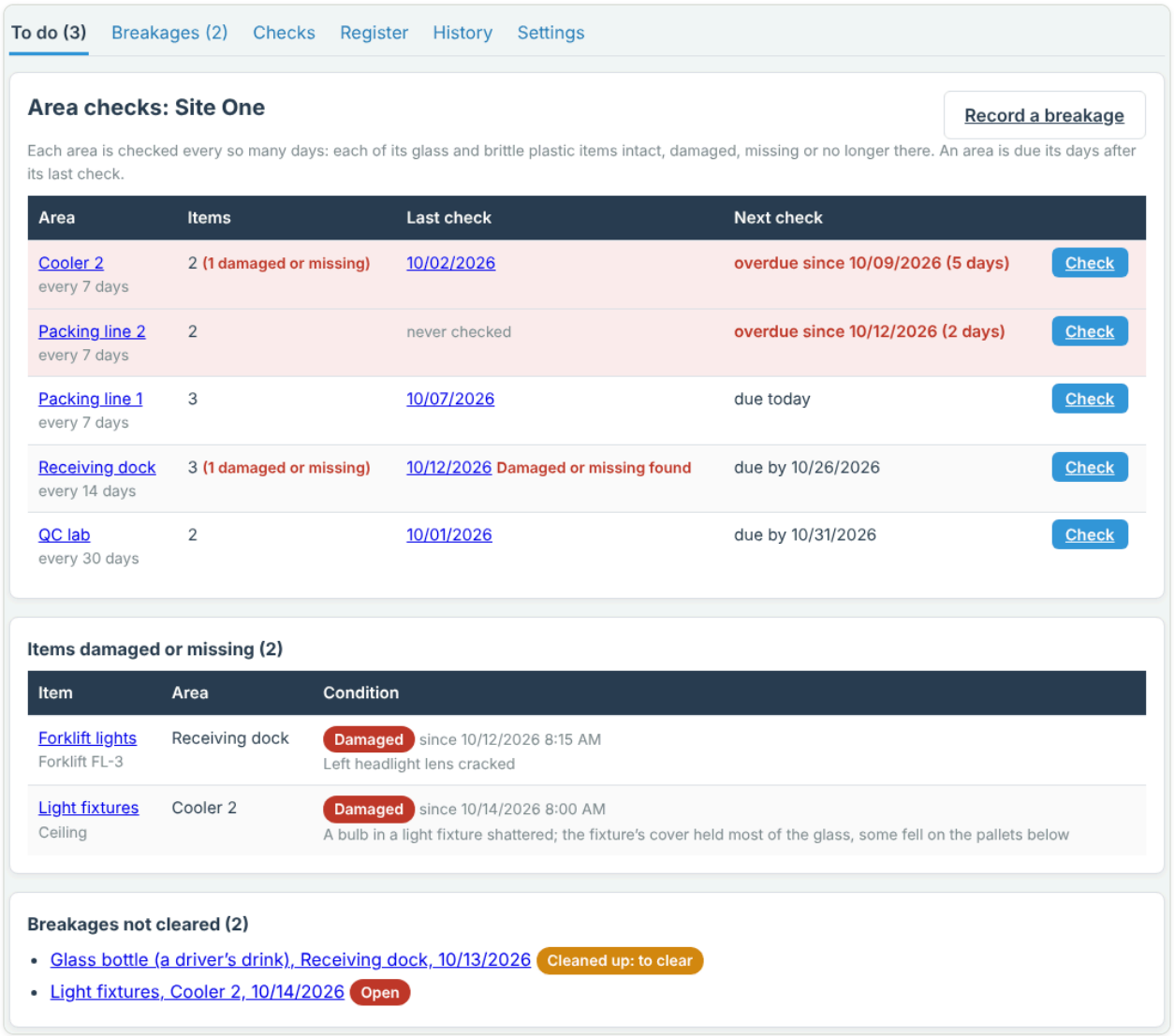


An area of the register, with its items

A site has up to 100 areas, each with its own name, and an area up to 150 items. change the area, or change on an item, changes it (select Save). no longer there on an item, for one taken out or replaced by one of metal, asks Why, then Set it aside: it is listed greyed under No longer there, and it is there again puts it back. No longer check this area takes the area off To do; its checks and breakages stay, and Check this area again puts it back. An item's Condition is the newest of its last check, a breakage of it and its repair.

CHECKING AN AREA

To do, where the page opens, shows each area with its items (and how many are damaged or missing), its last check and its next one: due by a day, due today, or overdue since a day, in red. An area is due its days after its last check (never checked: after it was added). Below, the items damaged or missing now, since when and what was found, and the breakages not cleared.

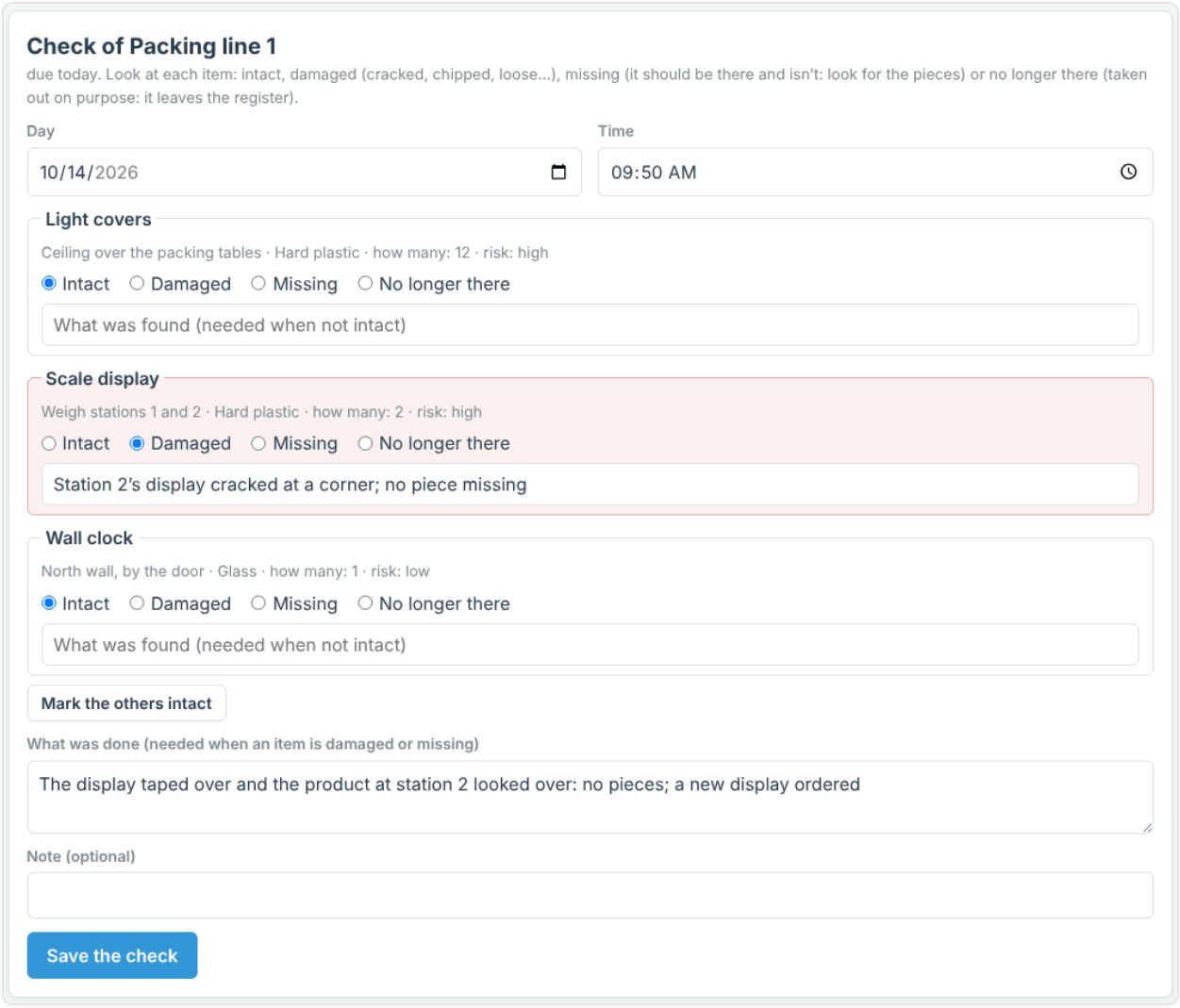


What is to do: the area checks, the items damaged or missing and the breakages not cleared

To check an area:

1. Select Check on the area (or Check this area on it): each item in use shows with where it is, its material, how many and its risk.

2. Check the Day and Time (now; or the time it was done, up to 14 days back, for a check done on paper).
3. Look at each item and choose Intact, Damaged (cracked, chipped, loose...), Missing (it should be there and isn't: look for the pieces) or No longer there (taken out on purpose: the check sets it aside). For an item not intact, type What was found. Mark the others intact marks the items not chosen yet.
4. If an item is damaged or missing, type What was done (the product nearby checked, the area cleaned, the item taken out or guarded...), and a Note if you want.
5. Select Save the check.



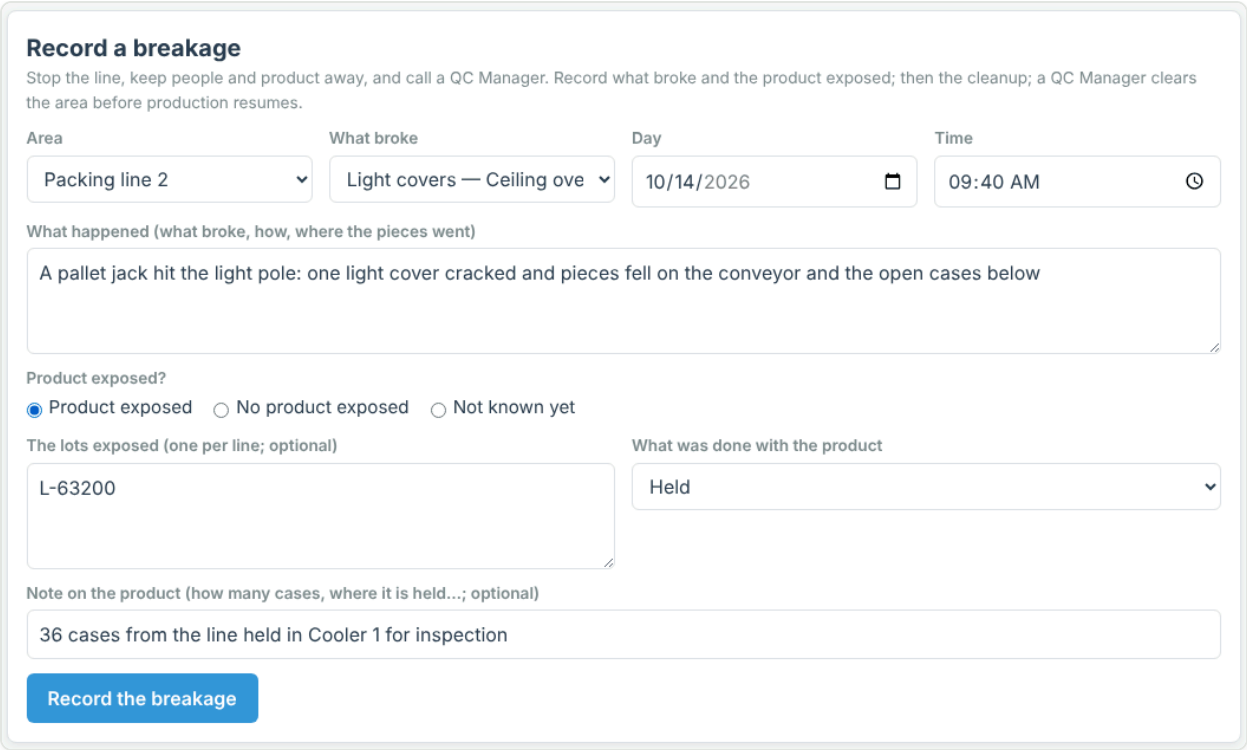
Checking an area: the scale display is damaged

A check with every item intact is Passed; one with an item damaged or missing is Damaged or missing found, and shows Record a breakage, if something broke. Once the item is repaired or replaced, select repaired or replaced on it (in the area), type how, and select It is intact now. A check shows its items with what was found; Void this check (Quality Control Managers) voids one recorded by mistake, saying why: it no longer counts, and the area is due from its check before.

BREAKAGES

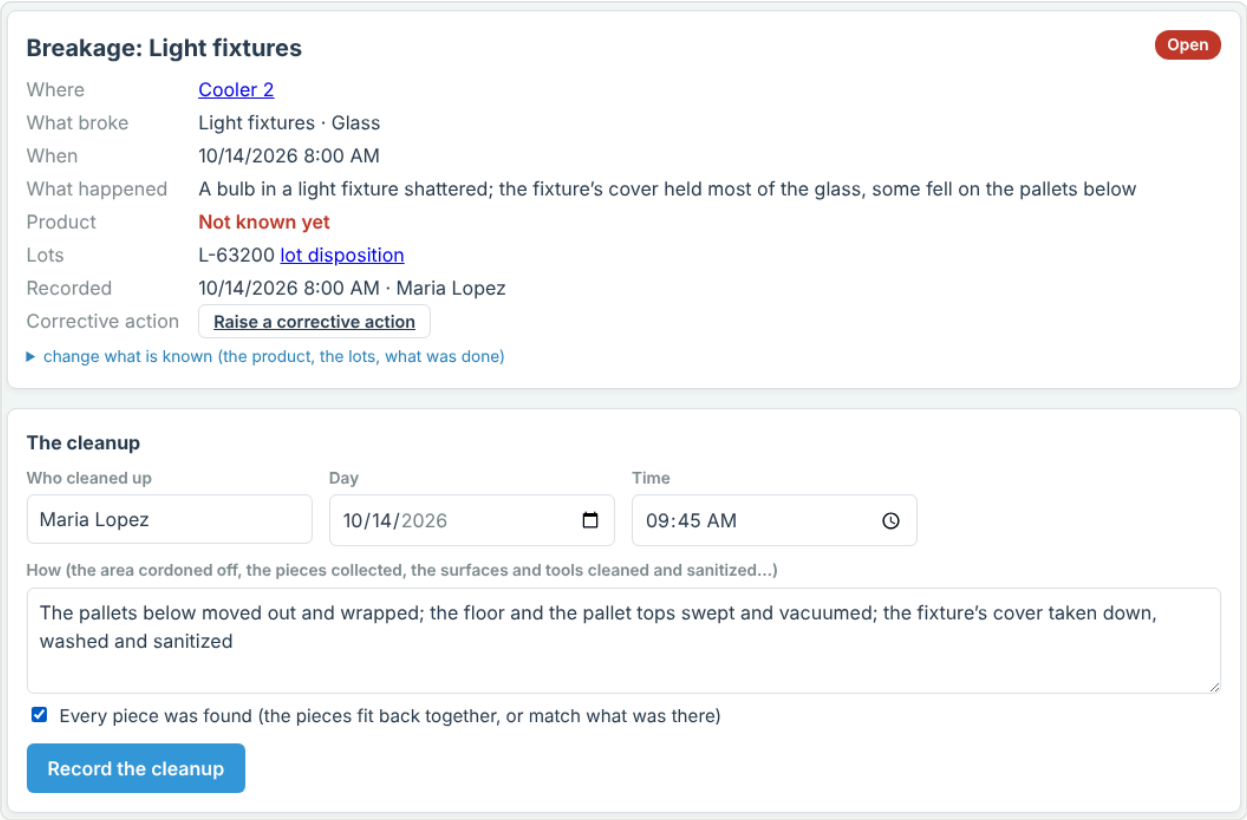
When glass or brittle plastic breaks, stop the line, keep people and product away, and call a Quality Control Manager. Then record it:

1. Select Record a breakage (on To do or Breakages, or Record a breakage here in an area).
2. Choose the Area (or Another place, and type Where it happened) and What broke: an item of that area, or Something not in the register, typing What it is and its material. A register item that broke is then Damaged.
3. Check the Day and Time, and type What happened (what broke, how, where the pieces went).
4. Choose whether product was exposed: Product exposed, No product exposed or Not known yet. If it was, type The lots exposed, one per line (each one found as an inspection is linked to it), choose What was done with the product (Held, Destroyed, Released after inspection, Re-sorted or repacked, Other) and type a Note on the product if you want (how many cases, where it is held...).
5. Select Record the breakage.



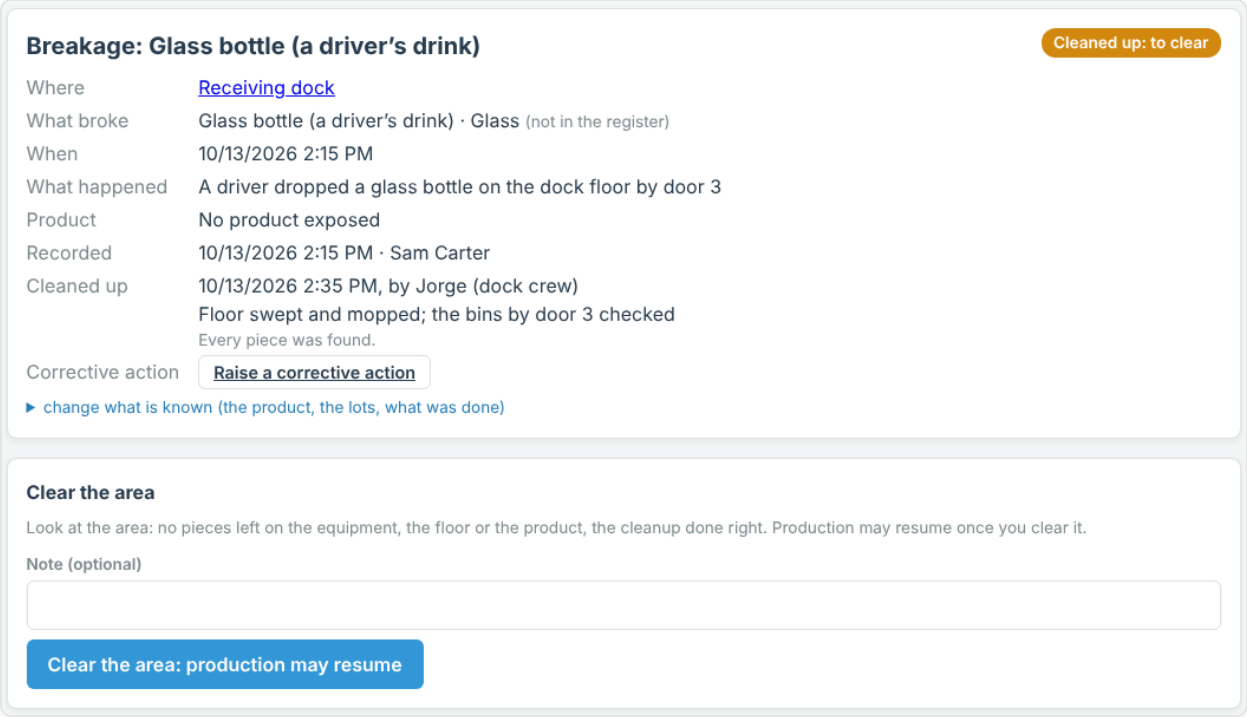
Recording a breakage: a light cover over the line, product exposed and held

The breakage is Open. change what is known updates the product, the lots and what was done with it until the area is cleared. Once the area is cleaned up, record the cleanup on the breakage: Who cleaned up (you, to start with), the Day and Time, How (the area cordoned off, the pieces collected, the surfaces and tools cleaned and sanitized...), and Every piece was found if the pieces fit back together or match what was there; then select Record the cleanup. Add photos or PDFs (up to 6) of what broke and of the area after the cleanup under Photos (remove takes one off; neither on a cancelled breakage).



A breakage this morning, with its cleanup typed in

A cleaned-up breakage is Cleaned up: to clear. A Quality Control Manager looks at the area (no pieces left on the equipment, the floor or the product), types a Note if needed (why the area can be cleared anyway when not every piece was found), and selects Clear the area: production may resume. It is then Cleared. An area can be cleared only once it is known whether product was exposed and, if it was, what was done with it.



A breakage cleaned up, for a Quality Control Manager to clear

Raise a corrective action starts one from a breakage (see 6.9). Cancel this breakage (Quality Control Managers) cancels one recorded by mistake, saying why, until it is cleared: it no longer counts. The inspection of an exposed lot links to its breakages, with a warning while one isn't cleared.

Breakages lists those not cleared, then the breakages of the dates chosen (the last 90 days to start with), with a Status or All; from an inspection, the breakages its lot was exposed to. Checks lists the area checks of the dates chosen (the last 30 days to start with), for an Area or All. History lists everything done.

> **Note:** The Settings (Quality Control Managers) say how often a new area is checked (every 7 days to start with; 1 to 365; each area keeps its own), and whether Trend Alerts reports the area checks overdue and the breakages not cleared (see 6.13).

IN THE FOOD SAFETY APP

Area checks and breakages can also be recorded in the Food Safety app (see 6.71). Its Glass & brittle check lists each area with its items: each one intact, Yes or No, and if not, damaged, missing or no longer there, with what is wrong; then the

action taken and a note. A finished run is an area check, and the items' condition is updated. Its Glass or brittle breakage records a breakage in any area: what broke (an item of the area, or Other (type it below)), what happened, the product exposed and its lots, what was done with the product, and the cleanup when Cleaned up by is answered; the area is then cleared here, as usual.

In the add and change forms of an area, Location in the Food Safety app and Area in the Food Safety app say where the app lists it, for both logs (see 6.72).

6.49 Water Testing

Packing house > Water Testing keeps the water sources the site uses (wells, city water, storage tanks, ice machines...), what each one's water is used for (product wash or contact, hand washing, ice, cooling, irrigation) and the tests each needs, such as generic E. coli or total coliforms, each with its limit and how often it is sampled. Each sample is recorded when it is taken and its result when the lab reports it, with the lab's report; the result is judged against the test's limit. A failed result says what was done and is sampled again within a few days; a passing retest closes it, and a source can be kept out of use until it passes again.

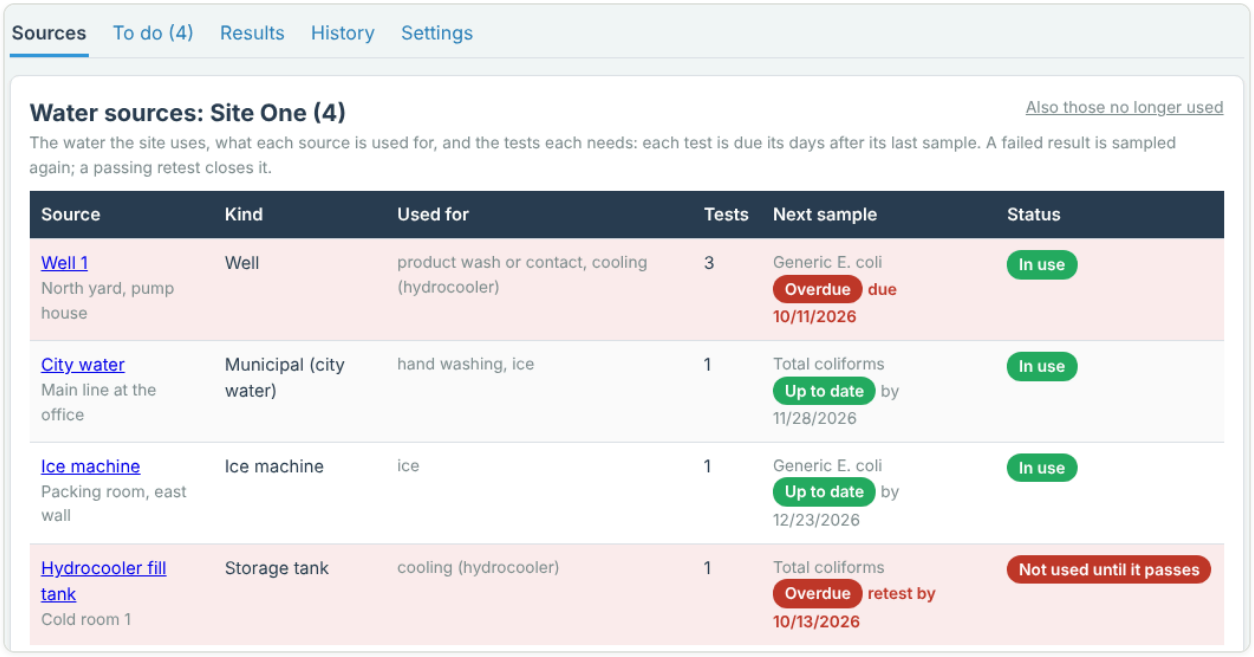
Who	What they do
Everyone with the Water Testing permission	Record the samples and enter their results, add the lab's reports, raise a corrective action from a failed result, and see the sources, the tests, the results and the history.
Quality Control Managers	Keep the water sources and their tests and the settings, keep a source out of use (suspend it) or use it again, close a failed result without a passing retest, void a result and remove a file.

WATER SOURCES AND THEIR TESTS

Sources, where the page opens, lists the site's water sources in use, each with its kind, what its water is used for, how many tests it has, its next sample and whether it is in use. A source with a test overdue, or not used now, stands out in red. Also

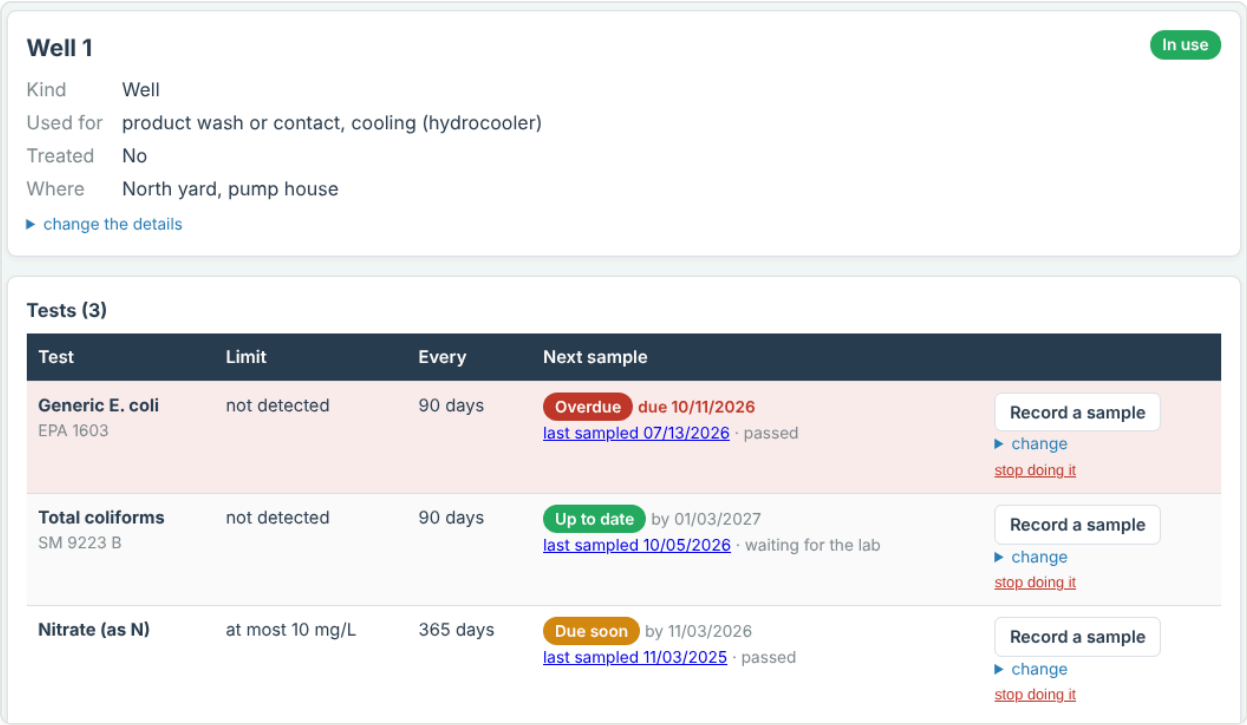
those no longer used shows the sources set aside too. Quality Control Managers add a source and its tests:

1. Under Add a water source, type its Name (Well 1, City water, Ice machine…), choose its Kind (Well, Municipal (city water), Surface water, Storage tank, Ice machine or Other), type Where it is if you want, tick what Its water is used for (at least one) and type a Note if you want, then select Add the source. The source opens. Tick Its water is treated before use (chlorinated, filtered, UV…) for a source whose water is treated: surface water used for the product, hand washing or ice must be, and an untreated one is shown in red with a warning, in both countries (the US Produce Safety Rule and Canada both ask for potable water there).
2. Under Add a test, choose What is tested: Generic E. coli, Total coliforms, Nitrate (as N), Nitrite (as N), Heterotrophic plate count, or Other (then type Its name, such as Free chlorine (residual)). Choosing one of the list fills in its usual Unit, Limit and how often, following what the source’s water is used for and the site’s country: for water that touches the product, the hands or ice, generic E. coli and total coliforms Not detected in 100 mL; for irrigation water only, no limit to start with for those two, since it comes from the site’s agricultural water assessment (US) or its scheme (CanadaGAP); the heterotrophic plate count’s 500 CFU/mL only at a US site (a Canadian site types its own).
3. Check the Unit, the Limit (Not detected, At most or At least, with the Limit value), how often it is Sampled every (days) and the Lab method if you want, then select Add the test. The test is due its days after it was added.



The water sources of a site

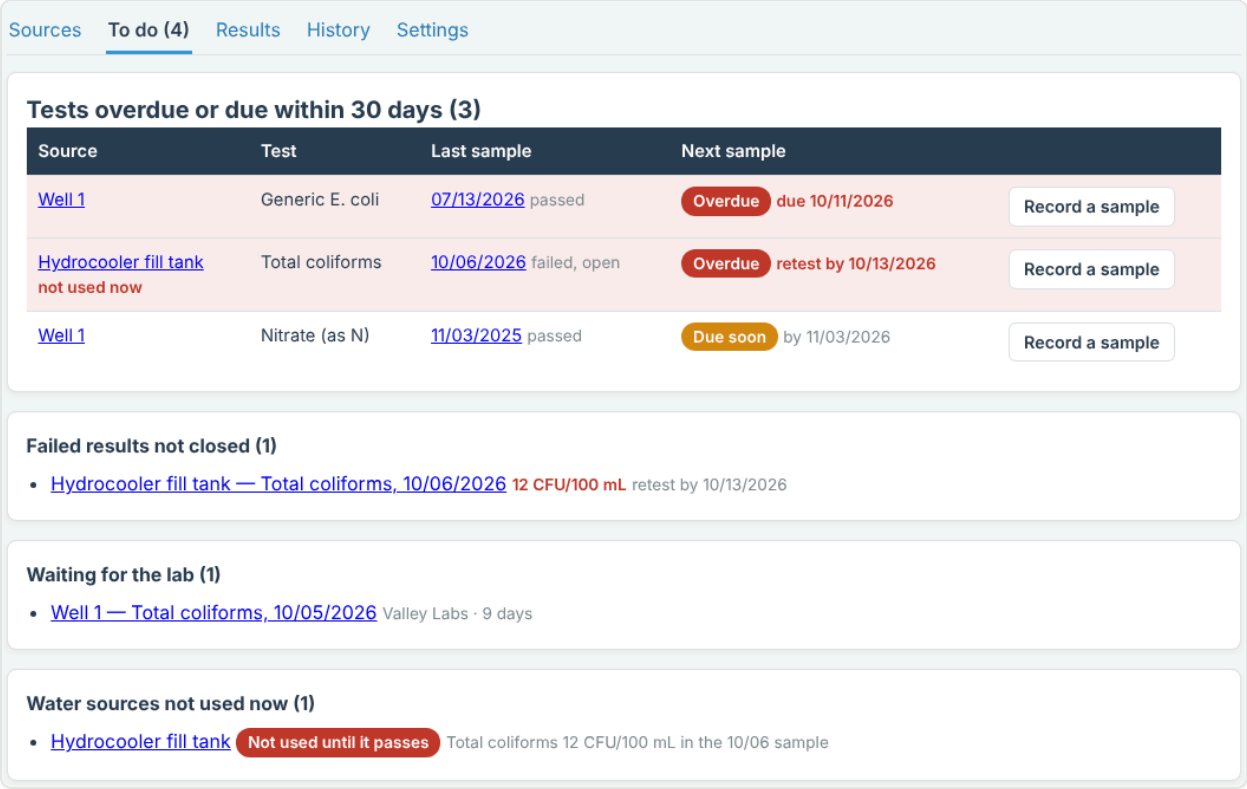
A site has up to 100 water sources, each with its own name, and a source up to 20 tests. change the details (on the source) and change (on a test) change them: select Save. What is tested can’t change once added: stop doing it and add another. A change of limit applies to the results recorded after it; those already judged stay as they were. stop doing it takes a test off what is due; Do it again puts it back. No longer used (set it aside), saying Why, sets the source aside: its tests are no longer due and its results stay; Use it again puts it back.



A water source with its tests

RECORDING A SAMPLE

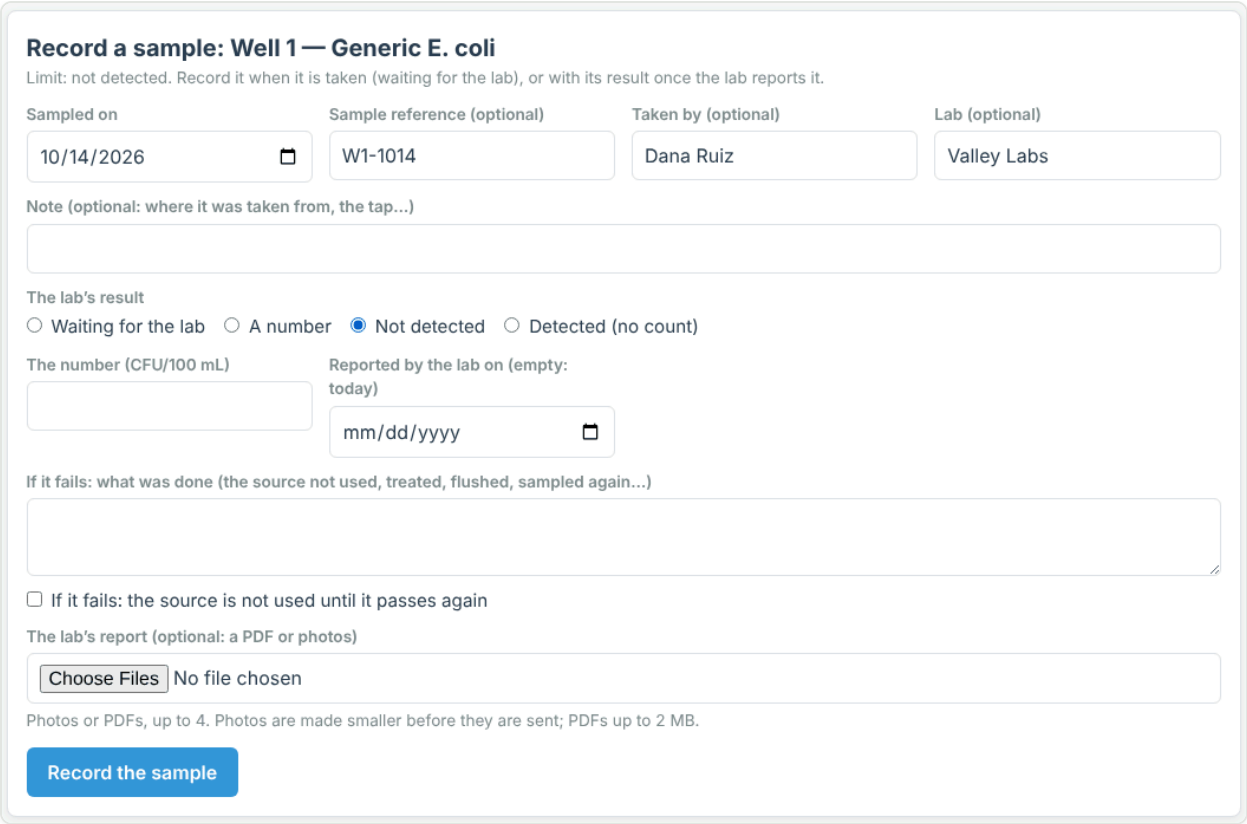
A test is due its days after its last sample (never sampled: after it was added), and due soon within the Settings' days before that; then it is overdue. To do lists the tests overdue or due soon (with a badge: Overdue in red, Due soon, and retest by a day after a failed result), the failed results not closed, the samples waiting for the lab (late after the Settings' days) and the sources not used now.



What is to do: the tests overdue or due soon, the failed result, the sample waiting for the lab and the source not used

To record a sample:

1. Select Record a sample on the test (on To do, or in the source's tests).
2. Check the day it was Sampled on (today, or up to 365 days back), and type the Sample reference, who it was Taken by (you, to start with), the Lab (the labs already used and the site's suppliers on Approved Suppliers are offered as you type) and a Note if you want (where it was taken from, the tap...).
3. If the lab hasn't reported yet, leave The lab's result on Waiting for the lab. Otherwise choose A number (and type The number), Not detected or Detected (no count), and the day it was Reported by the lab on (empty: today).
4. If it fails, type what was done (the source not used, treated, flushed, sampled again...). A Quality Control Manager can also tick that the source is not used until it passes again.
5. Add the lab's report if you have it (a PDF or photos, up to 4 files), then select Record the sample.

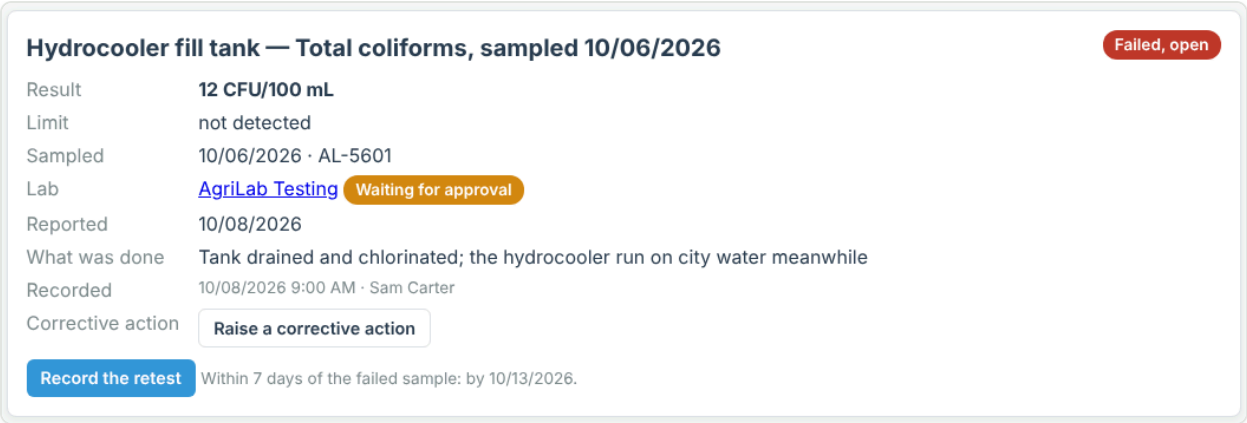


Recording a sample of Well 1 for generic E. coli, not detected

The result is judged against the test's limit: Passed or Failed. Detected (no count) can't be judged against a number: the lab's count is asked for. A failed result needs what was done. For a sample waiting for the lab, select Enter the lab's result on it when the lab reports, and Save the result.

A FAILED RESULT

A failed result is sampled again within the Settings' days: select Record the retest on it. A later passing sample of the test closes the failed results sampled before it, and a source not used until it passes is used again once none of its failed results is open. Raise a corrective action starts one from a failed result (see 6.9).



A failed result of the hydrocooler fill tank, to sample again

Quality Control Managers can also close a failed result by hand with Close it without a passing retest, saying why (the source stays suspended until it is used again on its page), and void any result recorded by mistake with Void it, saying why: it no longer counts; the failed results a voided pass had closed are closed by a later passing sample of the test, if there is one, or else open again, and a source the voided pass had put back in use is not used again until it passes. On a source's page, Do not use it (suspend it), saying why, keeps the source out of use Until it passes again (it is used again on its own when its failed results are closed by a passing retest) or Until a QC Manager uses it again; Use it again ends it.

Results lists the samples of the dates chosen (the last 365 days to start with), for a Source or all, and a Status (All but voided to start with), with Print. History lists everything done.

> **Note:** The Settings (Quality Control Managers) say when a test is due soon (within 30 days to start with; 0 to 180), within how many days a failed result is sampled again (7; 1 to 60), after how many days waiting for the lab a result is late (10; 1 to 60), and whether Trend Alerts reports the tests overdue and the failed results not closed (see 6.13).

6.50 Maintenance

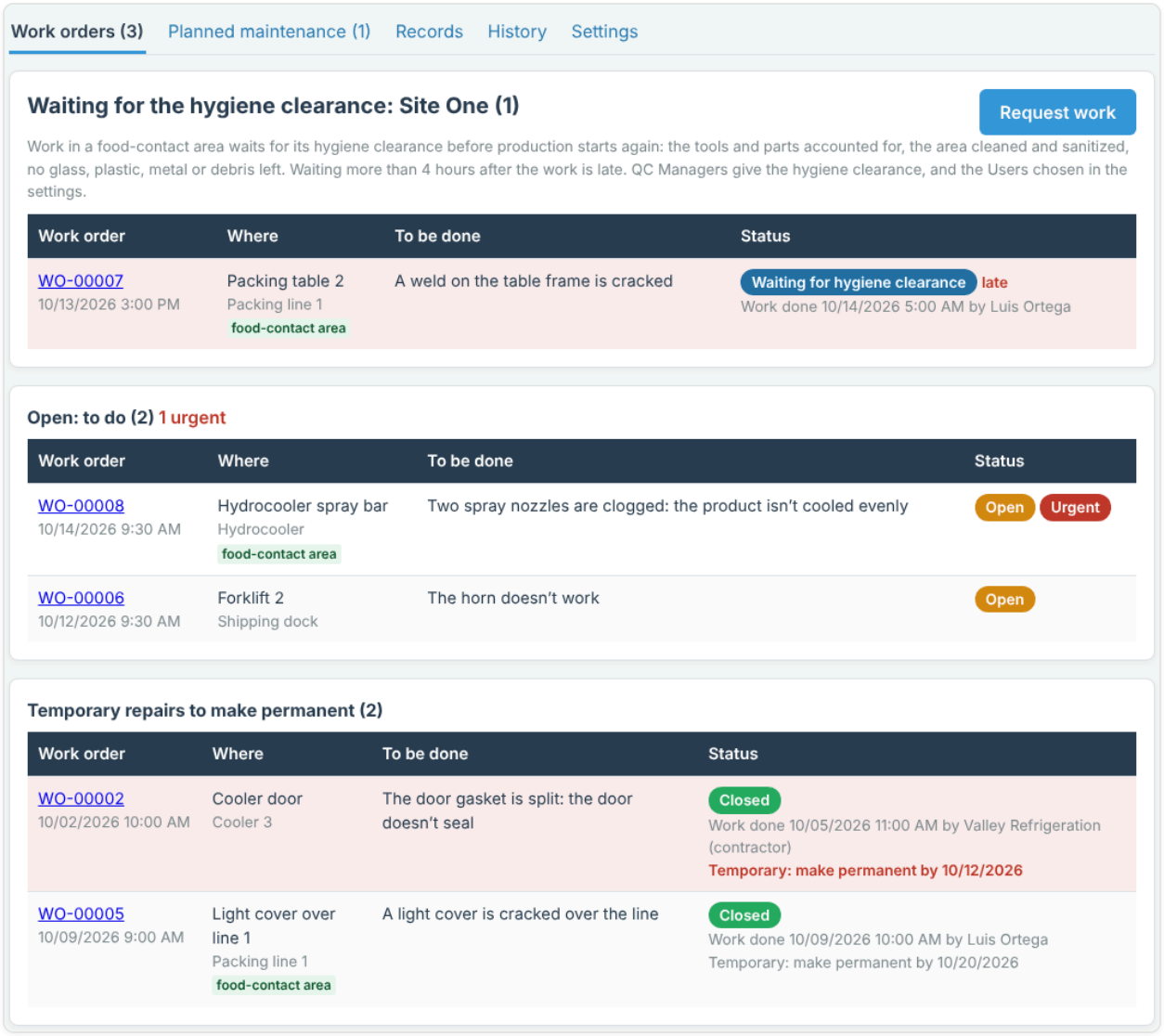
Packing house > Maintenance keeps the work orders for repairs in the packing house: what is to be done and where, how urgent, and whether it is in a food-

contact area; the work done, by the site's staff or a contractor, and whether it is a temporary repair to be made permanent by a date; and, for work in a food-contact area, the hygiene clearance before production starts again: the tools and parts accounted for, the area and the equipment cleaned and sanitized, and no glass, plastic, metal or debris left. Work that isn't right is sent back to be done again. It also keeps the planned maintenance: tasks done on equipment every so many days.

Who	What they do
Everyone with the Maintenance permission	Request work, record the work done, make a temporary repair permanent, record the planned maintenance done, raise a corrective action from a work order, and see the work orders, the planned tasks, the records and the history.
The Users chosen in the Settings	Also give the hygiene clearance, or send the work back.
Quality Control Managers	Give the hygiene clearance or send the work back, change any open work order and ask for the clearance for any area, cancel a work order, keep the planned tasks and the settings, and void a planned maintenance record.

WORK ORDERS

Work orders, where the page opens, shows the work orders waiting for the hygiene clearance (in red when waiting longer than the Settings' hours after the work), those open with their work to do (the urgent first) and the temporary repairs to make permanent (in red past their date). Each has its number (WO-00001, numbered at each site), where it is, what is to be done and its status; the number opens it.

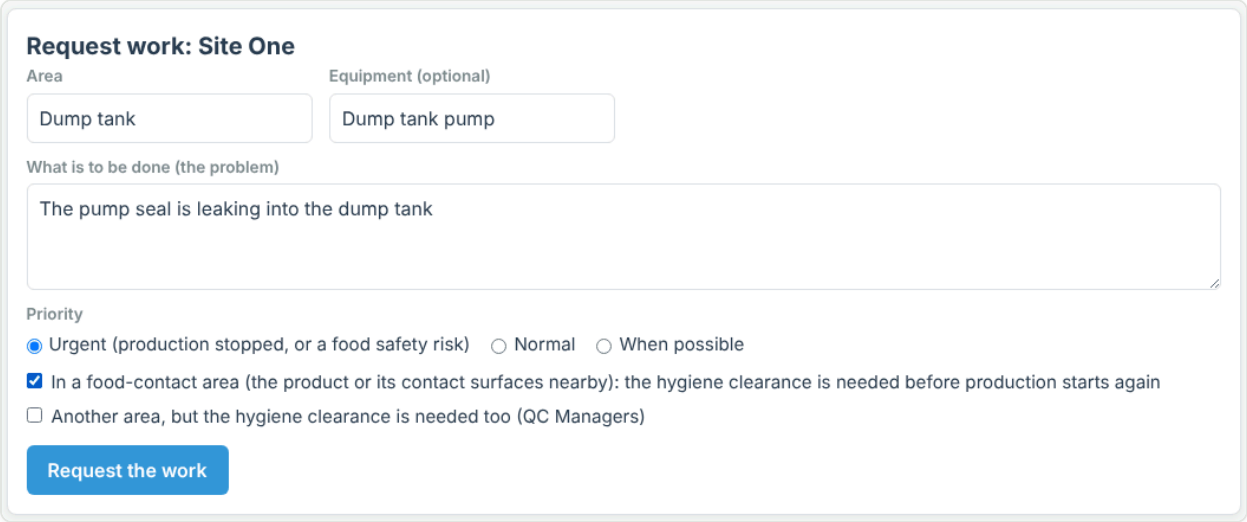


The work orders of a site

To request work:

1. Select Request work.
2. Type the Area (the site's areas on Sanitation and on Glass and Brittle Plastics, and the areas typed before, are offered as you type), the Equipment (optional) and What is to be done (the problem).
3. Choose the Priority: Urgent (production stopped, or a food safety risk), Normal or When possible.
4. Tick In a food-contact area if the product or its contact surfaces are nearby: the hygiene clearance is then needed before production starts again. A Quality

Control Manager can instead tick Another area, but the hygiene clearance is needed too. Then select Request the work.



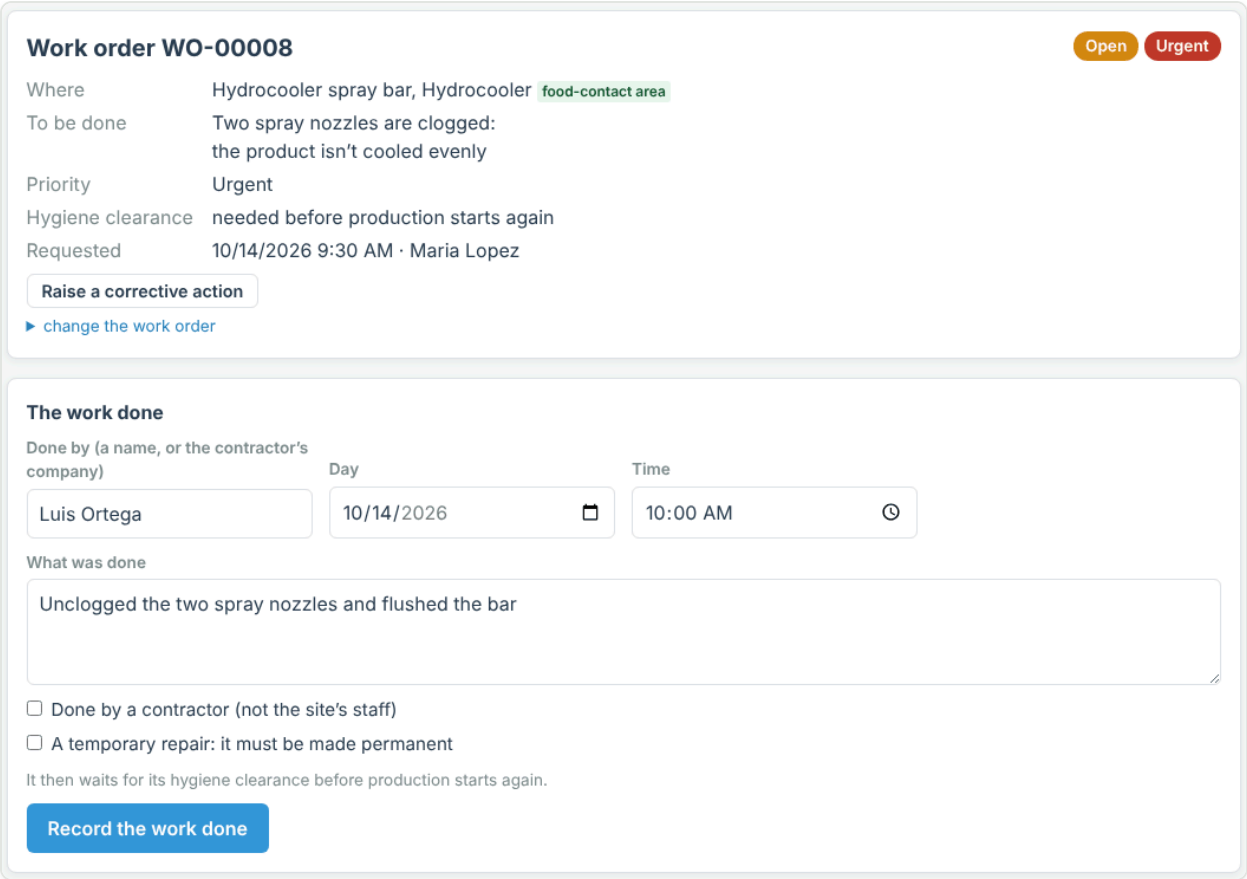
Requesting work in a food-contact area

The person who requested it, or a Quality Control Manager, can change it while it is open with change the work order, then Save. Only a Quality Control Manager can take off In a food-contact area (and so the hygiene clearance it needs): for anyone else the box stays ticked, saying so.

RECORDING THE WORK DONE

When the work is done, open the work order and, under The work done:

1. Type who did it in Done by (a name, or the contractor's company), and tick Done by a contractor if it wasn't the site's staff.
2. Check the Day and the Time it was done (today or up to 14 days back, not before the day it was requested, and not later than now), and type What was done.
3. If it is a temporary repair, tick A temporary repair: it must be made permanent and check the day it is Made permanent by (the Settings' days after today to start with; up to a year).
4. Select Record the work done. When the hygiene clearance is needed (in a food-contact area, or asked for by a Quality Control Manager), the work order then waits for it; otherwise it is closed.

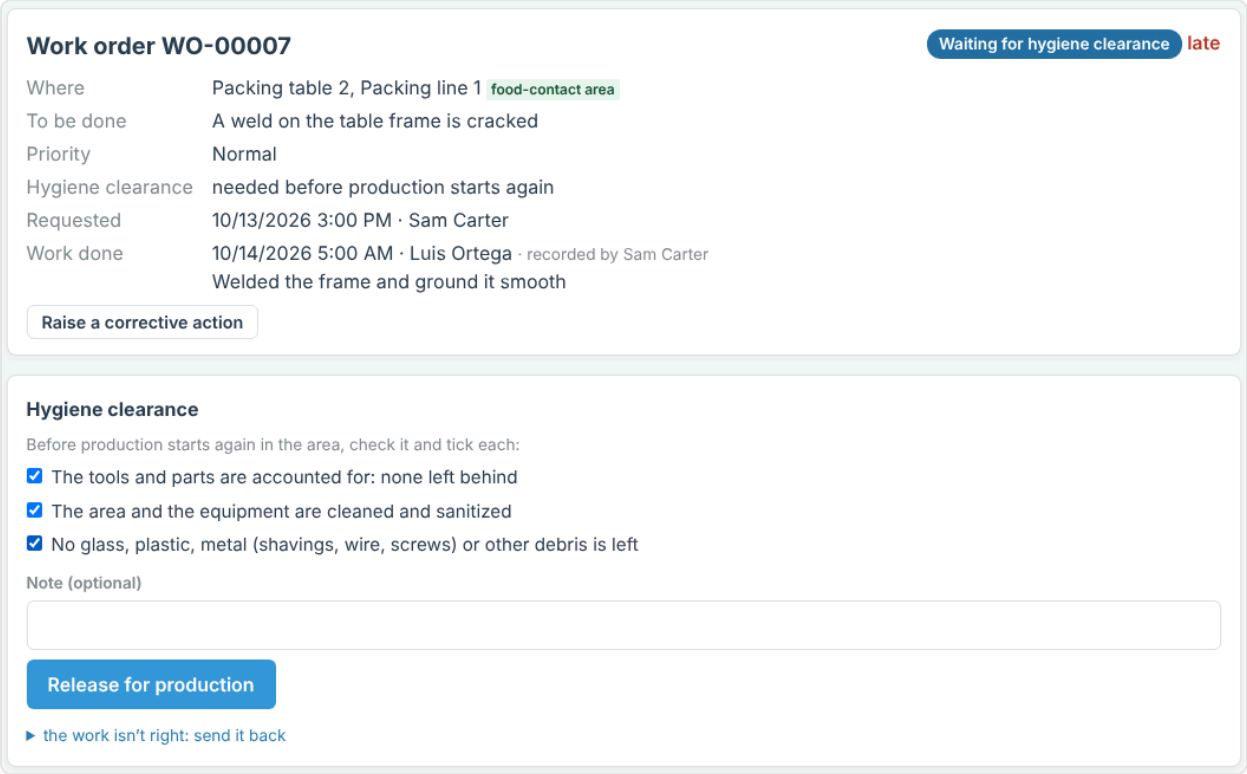


Recording the work done on an urgent work order

A temporary repair is made permanent later: on the work order, under The temporary repair made permanent, check the Day (from the day of the work to today), type How (what was done) and select It is permanent now.

THE HYGIENE CLEARANCE

Before production starts again in the area, a Quality Control Manager, or a User chosen in the Settings, checks it. On the work order, under Hygiene clearance, tick each of the three checks (The tools and parts are accounted for: none left behind; The area and the equipment are cleaned and sanitized; No glass, plastic, metal (shavings, wire, screws) or other debris is left), type a Note if you want and select Release for production: the work order is closed. All three are needed.



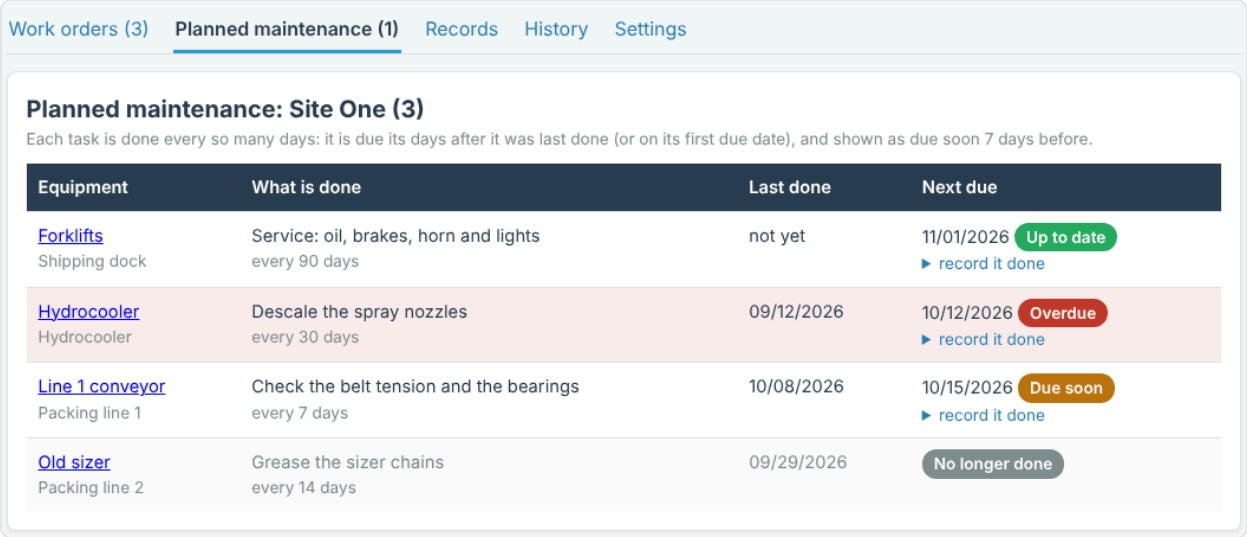
A work order waiting for its hygiene clearance, late

If one isn't so, select the work isn't right: send it back, type Why (what is to be put right) and select Send it back: the work order is open again, and the work is to be done and recorded again (who did it is kept). The work order shows how many times it was sent back.

> **Note:** A Quality Control Manager can cancel an open work order (requested by mistake, or twice) with Cancel the work order, saying why: it no longer counts. One with a corrective action can't be cancelled. Raise a corrective action starts one from any work order not cancelled, such as a problem found at the clearance (see 6.9).

PLANNED MAINTENANCE

Planned maintenance lists the site's planned tasks, each with its equipment and area, what is done and how often, when it was Last done and when it is Next due: Overdue (in red), Due today, Due soon (within the Settings' days) or Up to date. A task is due its days after it was last done, or on its first due date until it is first done.



The planned maintenance of a site

To record a task done, select record it done on it, check the day (today or up to 60 days back) and who did it, type a note if you want and select Done; or open the task and use Record it done. A task is recorded done once a day.

Quality Control Managers add a task under Add a planned task: the Equipment, the Area if you want, Every (days, 1 to 730), the day it is Due the first time on and What is done (lubricate the bearings, check the belt tension…), then Add the task. A site has up to 200 planned tasks. On a task, change the task changes it; no longer done (stop the task) takes it off what is due, and Do it again puts it back. A record made by mistake is voided with void (recorded by mistake), saying why: the task is then due from the record before.

Records lists the work orders requested between two dates (the last 30 days to start with), by Status (or those In a food-contact area) and a Search (area, equipment, work, who did it, or number), with Print. History lists everything done.

> **Note:** The Settings (Quality Control Managers) say after how many hours waiting for the hygiene clearance a work order is late (4 to start with; 1 to 72), within how many days a temporary repair is made permanent, to start with (14; 1 to 180), how many days before a planned task is due soon (7; 0 to 60), which of the site's Users with the page give the hygiene clearance besides the Quality Control Managers, and whether Trend Alerts reports the work waiting too long for its clearance, the temporary repairs past their date and the planned maintenance overdue (see 6.13).

IN THE FOOD SAFETY APP

Work can also be requested and recorded in the Food Safety app (see 6.71). Its Repair request makes a work order: its area (typed, or the Location and Area answered while the site has Areas), its equipment (from the site's Equipment list, see 6.72, or typed), what is wrong, whether it is a food contact surface (Yes asks which one: it is added to What is to be done on a line of its own, such as Food contact surface: Sizer cups, and ticks In a food-contact area) and its priority.

Repair done lists the open work orders, to record the work done; Hygiene clearance lists those waiting for it: cleared when the three checks are Yes, otherwise sent back with what is wrong, only by Quality Control Managers and the Users ticked under Who gives the hygiene clearance, besides the QC Managers in the Settings. Planned maintenance lists each planned task, to record it done. New and closed work orders reach the tablet at its next download.

In the add and change forms of a planned task, Location in the Food Safety app and Area in the Food Safety app say where the app lists it; in the Settings, Repair request in the Food Safety app says where the repair request is listed (see 6.72). With an Equipment list at the site, the Equipment of a planned task (required) and of a work order (optional) is a drop-down of it: one not on the list is refused with Choose the equipment from the list.

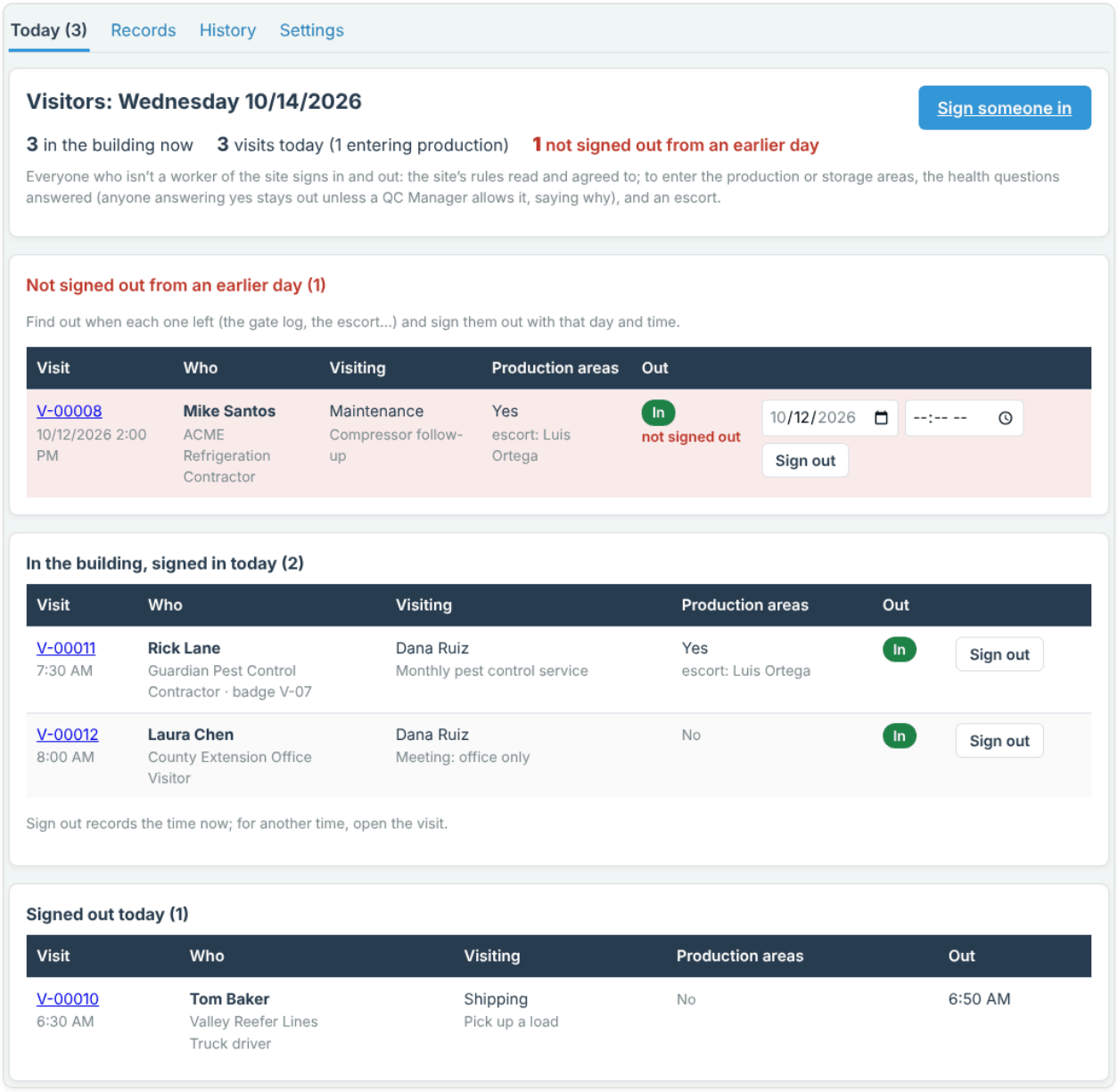
6.51 Visitors and Contractors

Management > Visitors and Contractors is the visitor log of a site. Everyone who comes in and isn't one of its workers (visitors, contractors, truck drivers, auditors and inspectors) is signed in: who they are and their company, who they visit and why, and whether they enter the production or storage areas, with the site's rules read and agreed to. To enter those areas, the person answers the health questions (anyone answering yes stays out unless a Quality Control Manager allows it, saying why) and, as the Settings ask, has an escort. When they leave, they are signed out. A visitor pass prints with the site's rules. It is in the Management menu, under People and security.

Who	What they do
Everyone with the Visitors and Contractors permission	Sign visitors and contractors in and out, change a visit while the person is in, print the visitor pass, and see Today, the records and the history.
Quality Control Managers	Also allow someone who answered a health question yes into the production areas, saying why, change a visit after the person left, void a visit recorded by mistake, and keep the Settings.

TODAY

Today, where the page opens, shows how many are in the building now and the visits today (with how many enter production); the tab counts those in the building. Those not signed out from an earlier day come first, in red (see Not Signed Out, below), then those In the building, signed in today, and those Signed out today. Each visit has its number (V-00001, numbered at each site) and its time in, who (the name, the company, the kind and the badge), who they are visiting and why, the Production areas (No; or Yes, with the escort and, after a health question answered yes, Not allowed into production or who allowed it) and when they left. The number opens the visit.



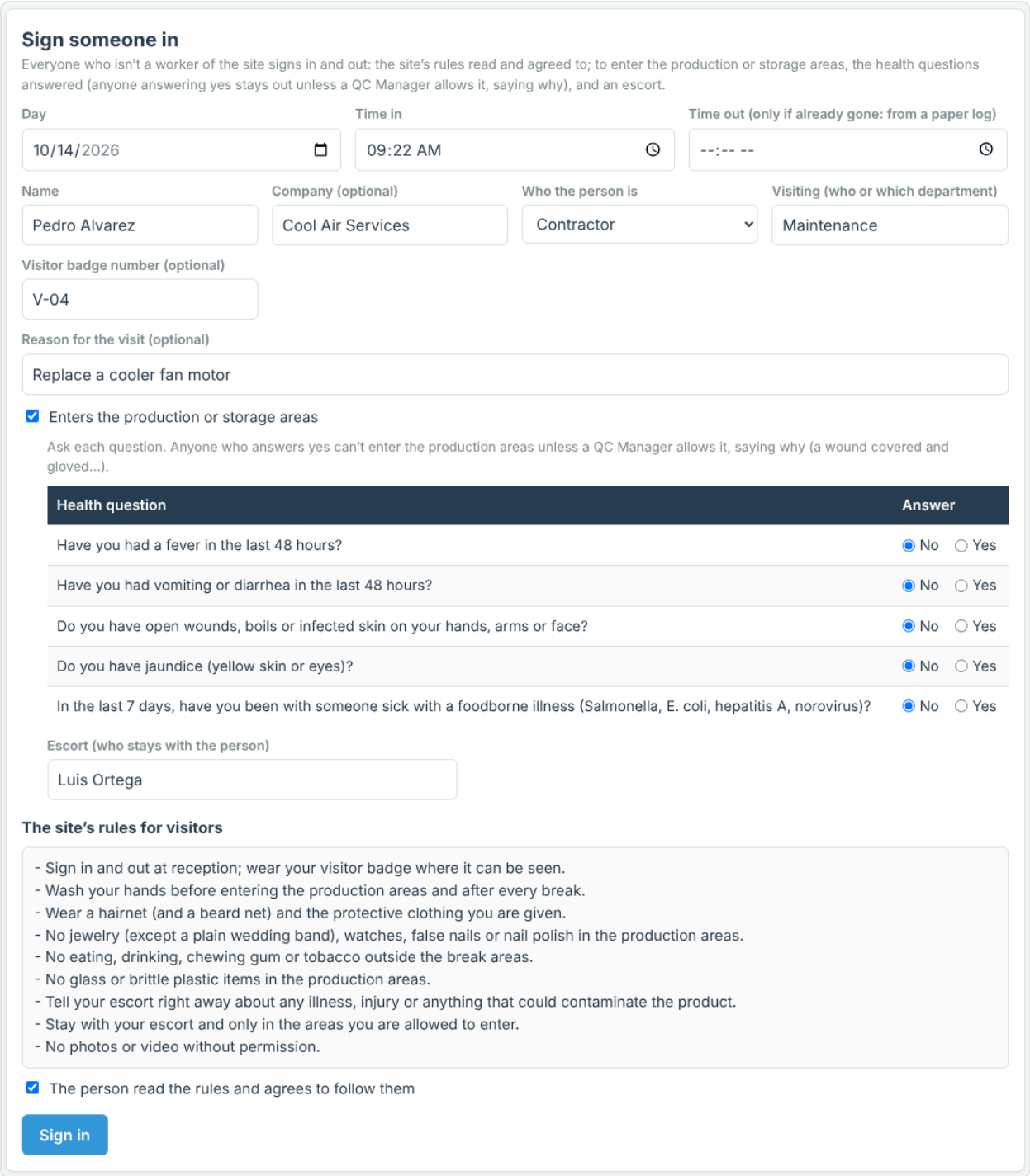
Today's visitors at a site

When someone leaves, select Sign out on their row: it records the time now. For another time, open the visit and, under Sign out, check the Day and the Time out (not before the person came in, and not later than now), then select Sign out.

SIGNING SOMEONE IN

1. Select Sign someone in.
2. Check the Day and the Time in (now, to start with). For someone already gone, recorded from a paper log, choose the day (up to 14 days back) and type the Time out too: a visit of an earlier day needs it.

3. Type the Name and, if there is one, the Company (the companies typed before and the site’s Approved Suppliers are offered as you type); choose Who the person is (Visitor, Contractor, Truck driver, Auditor or inspector, or Other); and type Visiting (who or which department) and, if you want, the Visitor badge number and the Reason for the visit.
4. If the person goes into the packing house, the coolers or the storage areas, tick Enters the production or storage areas. Ask each health question and choose No or Yes, and type the Escort (who stays with the person).
5. Show the person the site’s rules for visitors, tick The person read the rules and agrees to follow them, and select Sign in.



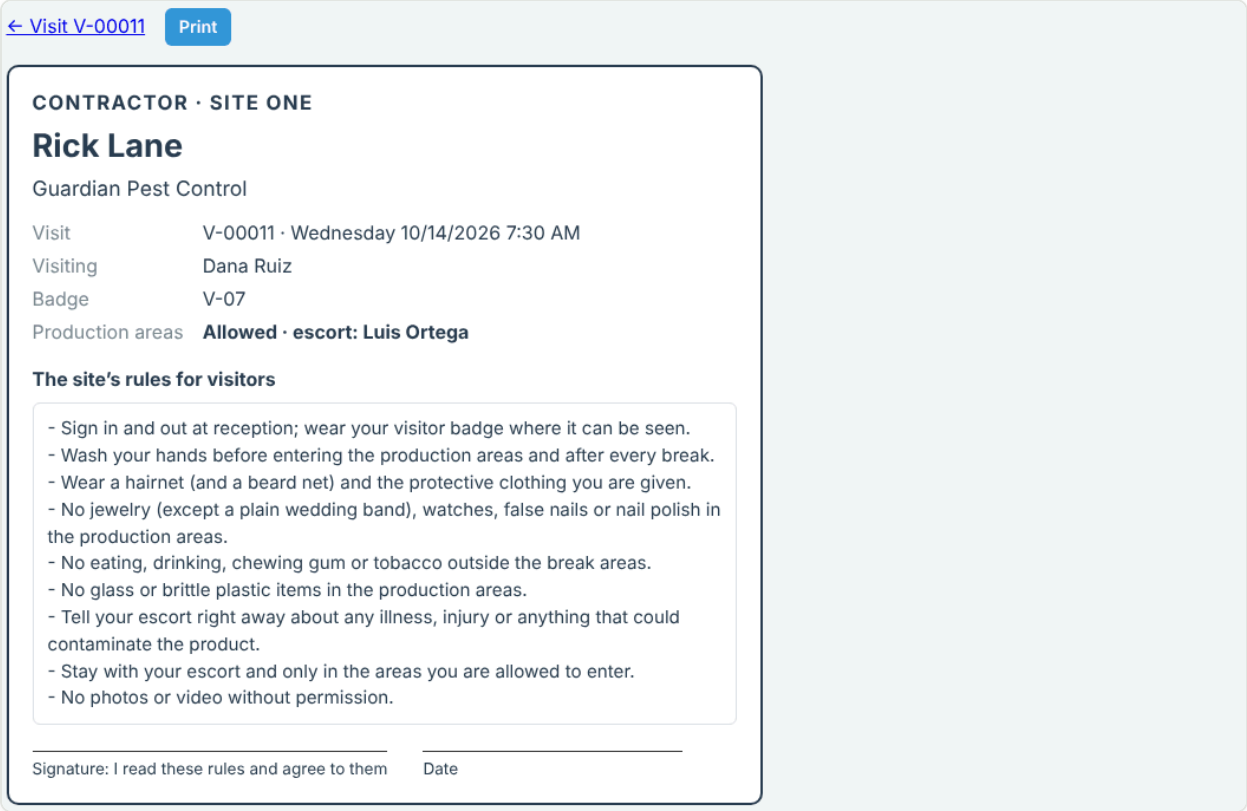
Signing a contractor in to the production areas

The five health questions ask about a fever, and vomiting or diarrhea, in the last 48 hours; open wounds, boils or infected skin on the hands, arms or face; jaundice; and being with someone sick with a foodborne illness in the last 7 days. Anyone who answers yes is signed in, but Not allowed into production. When the

company is one of the site's Approved Suppliers (see 6.45), the visit is linked to it and shows its standing next to the company.

A VISIT AND THE VISITOR PASS

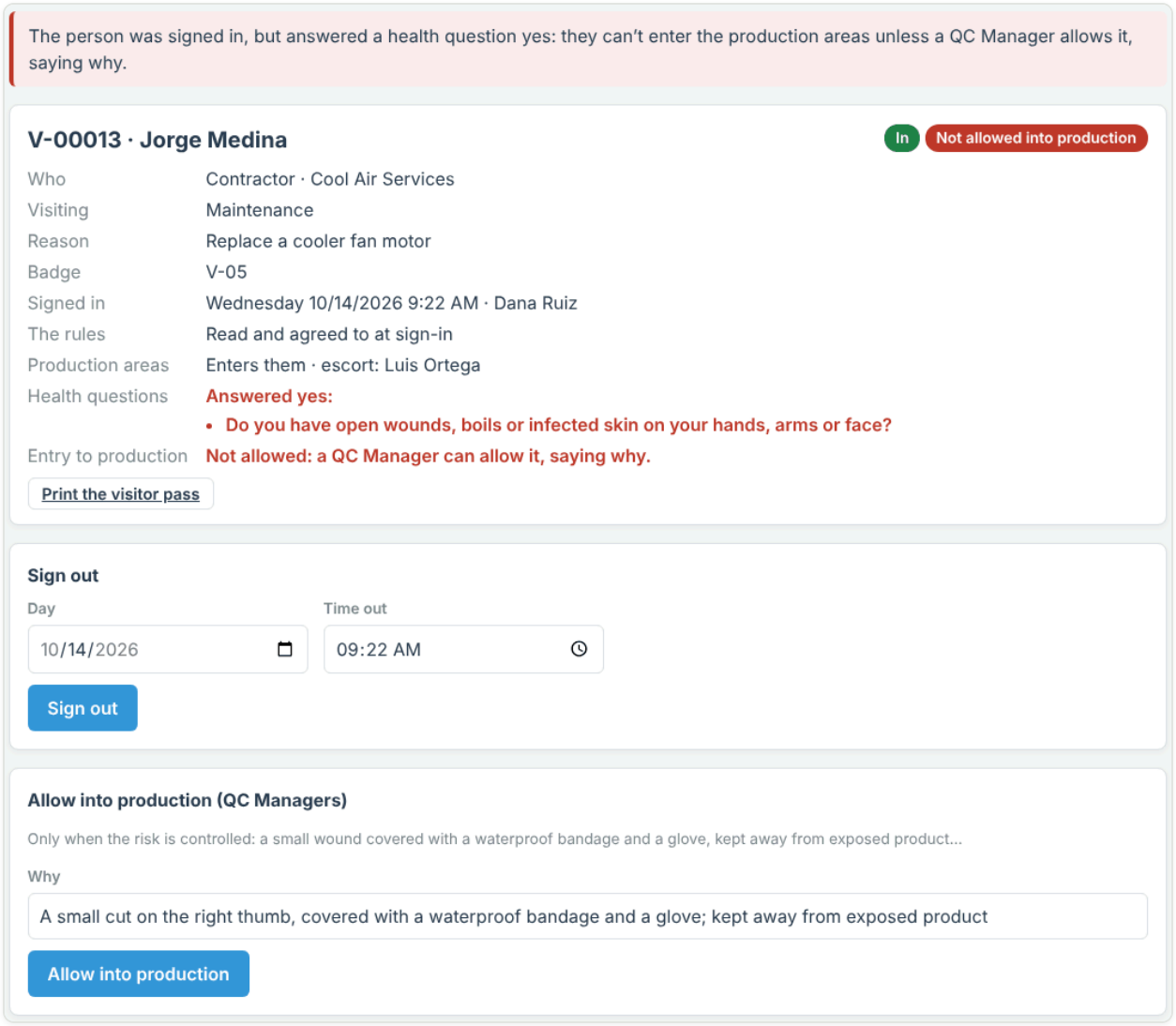
The visit shows who, who they are visiting, the reason and the badge, when the person was signed in and by whom (and when it was recorded, if later), when they were signed out, that the rules were read and agreed to, whether they enter the production areas (and the escort), the Health questions (All answered no, or those answered yes) and the Entry to production. Print the visitor pass opens the pass to print: who, the company, the visit and its day, who they visit, the badge, whether they may enter the Production areas (Allowed, with the escort; NOT ALLOWED; or Not to enter), the site's rules and a line to sign.



A contractor's visitor pass

Someone who answered yes stays out of the production areas unless a Quality Control Manager allows it, when the risk is controlled (a small wound covered with a waterproof bandage and a glove, kept away from exposed product…): on the visit, under Allow into production (QC Managers), type Why and select Allow into

production (also once the person has signed out, to correct the record). The visit then shows who allowed it, when and why.



A contractor who answered a health question yes, to be allowed in

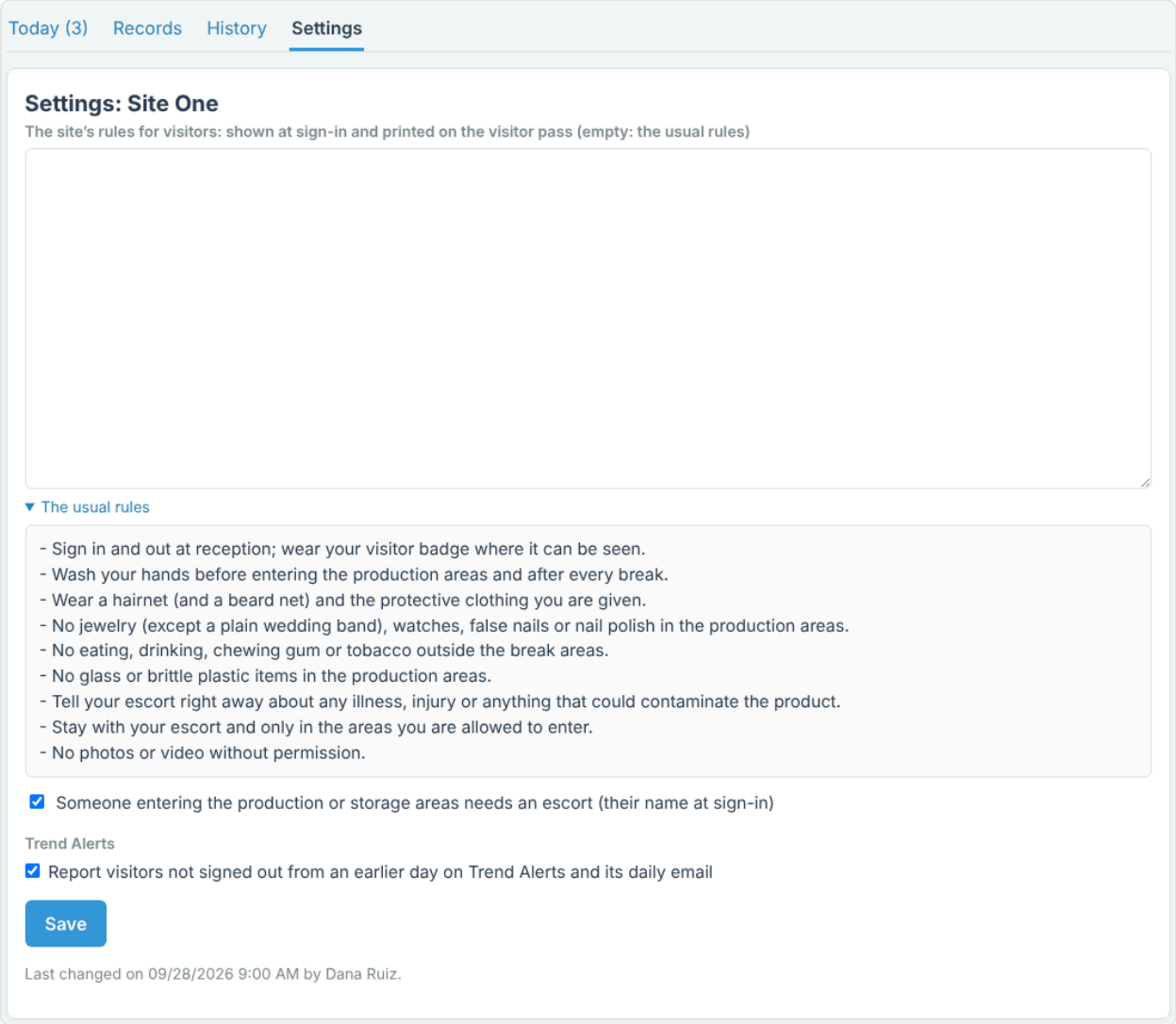
Change the visit corrects it, then Save: everyone with the permission while the person is in, and Quality Control Managers afterwards too. Changing the health answers, or whether the person enters production, decides the entry again: an allowance stands only while the answers stay the same. But someone kept out by a health answer stays out after a change by anyone but a Quality Control Manager, whatever the answers become, until a Quality Control Manager allows it.

> **Note:** A visit recorded by mistake, or twice, is voided by a Quality Control Manager with Void the visit (recorded by mistake; QC Managers): type Why and select Void it. It no longer counts.

NOT SIGNED OUT

Someone still signed in from an earlier day is listed first on Today, under Not signed out from an earlier day, in red, and on Trend Alerts (see 6.13). Find out when the person left (the gate log, the escort…), then on their row check the day, type the time and select Sign out.

Records lists the visits between two dates (the last 30 days to start with), by Who and by Visits (In, Signed out, Voided, Entering production or Not allowed into production), with a search by name, company, visiting, escort or badge: select Apply Filter, and Print to print the list. History lists everything done; it keeps which health questions were answered yes, not every answer (and, once the answers are cleared, only that one was).



The settings of Visitors and Contractors

Note: The Settings (Quality Control Managers) hold the site's rules for visitors, shown at sign-in and printed on the visitor pass (up to 4,000 characters; empty, the usual rules, which The usual rules shows: signing in and out, washing hands, hairnets, no jewelry, no glass, staying with the escort...); whether someone entering the production or storage areas needs an escort (yes, to start with); and whether Trend Alerts reports the visitors not signed out from an earlier day (on; see 6.13).

Note: Privacy (the visitors' personal information), in the Settings: Show a privacy notice at sign-in and on the visitor pass (why the information is collected, who sees it, how long it is kept; the site's own text, up to 600 characters, or the usual one, which The usual notice shows), and Clear the health answers of visits this many months after they ended (0 to 36; 0 keeps them). Until the settings are saved, a site in Canada shows the notice and clears the answers after 12 months (Canadian privacy law treats health information as sensitive); a site in the United States neither. Sign someone in then shows the Privacy notice to show or read to the person, and the visit says Privacy notice: Shown at sign-in. The visit itself stays (a food safety record, kept at least 2 years): only which health question was answered yes, and the note on why entry was allowed, are cleared, keeping "A question was answered yes (the answers were cleared some months after the visit)" or "All answered no", and who allowed the entry and when; its history too. A visit never signed out is cleared once its sign-in is that old. Cleared answers and the entry to production can't be changed afterwards. The daily Trend Alerts job, and opening Visitors and Contractors, clear them; the history says "Health answers cleared: 2 visits of more than 12 months ago". The Audit Pack's section says "Answered yes to a health question", without naming it, in both countries.

IN THE FOOD SAFETY APP

Visitors can also be signed in at the door with the Food Safety app (see 6.71). Its Visitor sign-in asks the name, the company, who the person is, who they visit and why, the badge, whether they enter the production or storage areas, the health questions, the escort, the site's rules (shown in the app) and a signature. A finished run is a visit, with the same rules as here: someone who answered a health question yes is Not allowed into production until a Quality Control Manager allows it. The app's check-out signs the person out: a time out a little ahead of now is recorded now, and one before the time in just after it. A visit of an earlier day needs its time out, so one sent without it waits on From the FS App.

In the Settings, Visitor sign-in in the Food Safety app says where the app lists the sign-in, and the visitors still in for check-out (see 6.72).

6.52 Employee Training

Management > Employee Training keeps the training of a site's workers: the people of the packing house (packing, sorting and grading, shipping, sanitation, maintenance...), kept on the page; they don't need to use Continuum. Each course says who must take it, how often it is taken again and how soon a new hire takes it; each session given is recorded with who attended, from its sign-in sheet; and the page shows, for every worker and every course they need, whether they are in date, due soon, overdue, or still to be trained. It is the first page of the Management menu, under People and security.

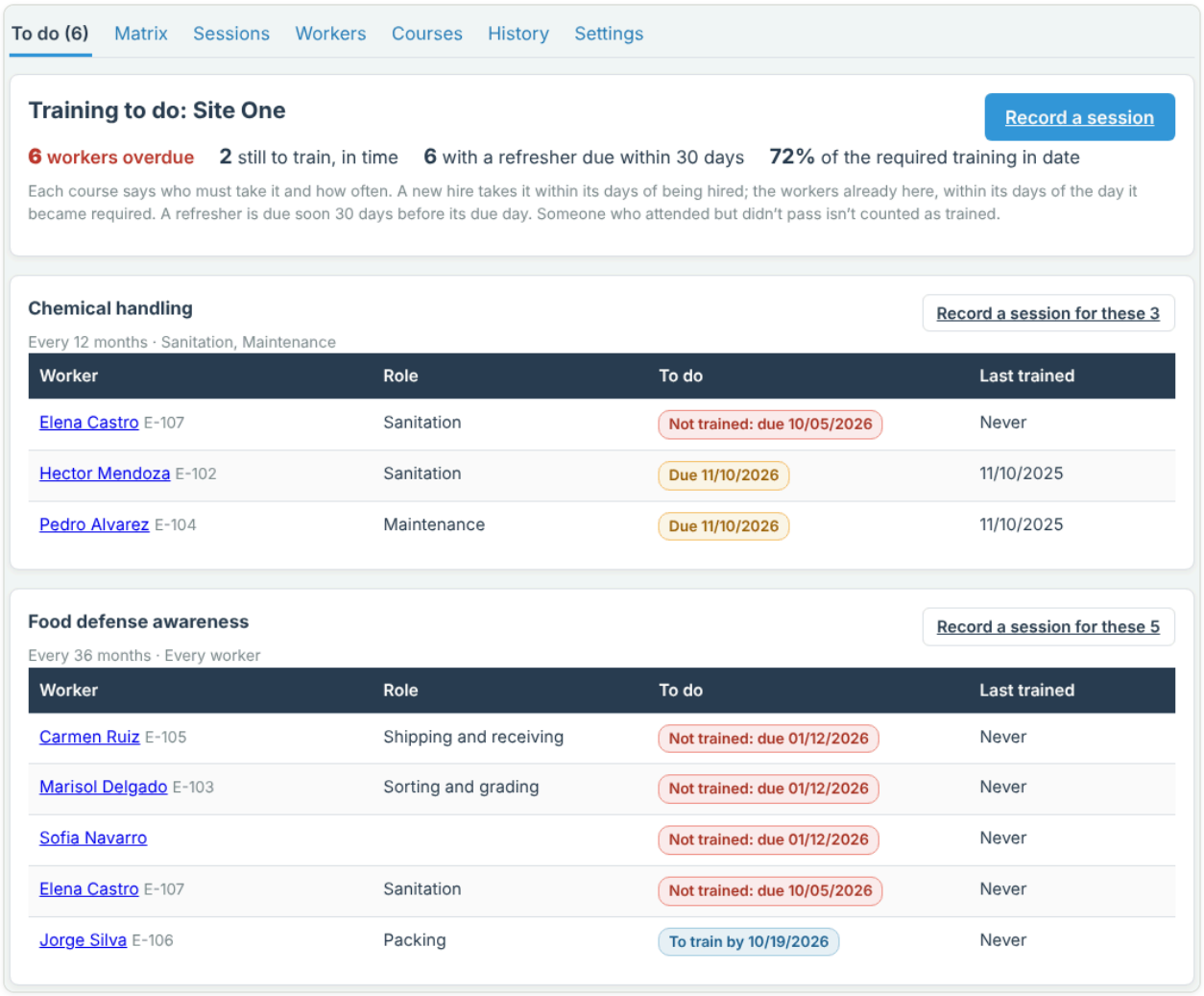
> **Note:** Employee Training is not Inspector Training (see 6.18), which stays as it is: Inspector Training qualifies the inspectors who use Continuum for the commodities they inspect, and flags an inspection by an inspector not qualified; Employee Training is for the site's workers, by role, and flags nothing on the inspections.

Who	What they do
Everyone with the Employee Training permission	Record the training sessions and add their sign-in sheets, change a session they recorded, add and change the workers (and mark one who left), and see To do, the Matrix, the sessions, the courses and the history.
Quality Control Managers	Also keep the courses and the roles, change and void any session, and keep the Settings.

TO DO

To do, where the page opens, shows how many workers are overdue (a refresher past due, or not trained past their time), how many are still to train in time, how many have a refresher due soon, and the share of the required training that is in date; the tab counts the workers overdue. Below, a card for each course with

something to do lists the workers: those Not trained or Overdue first (the earliest first), then those To train, then those with a refresher Due soon, each with their role, the state with its day and when they were Last trained. The worker's name opens the worker.

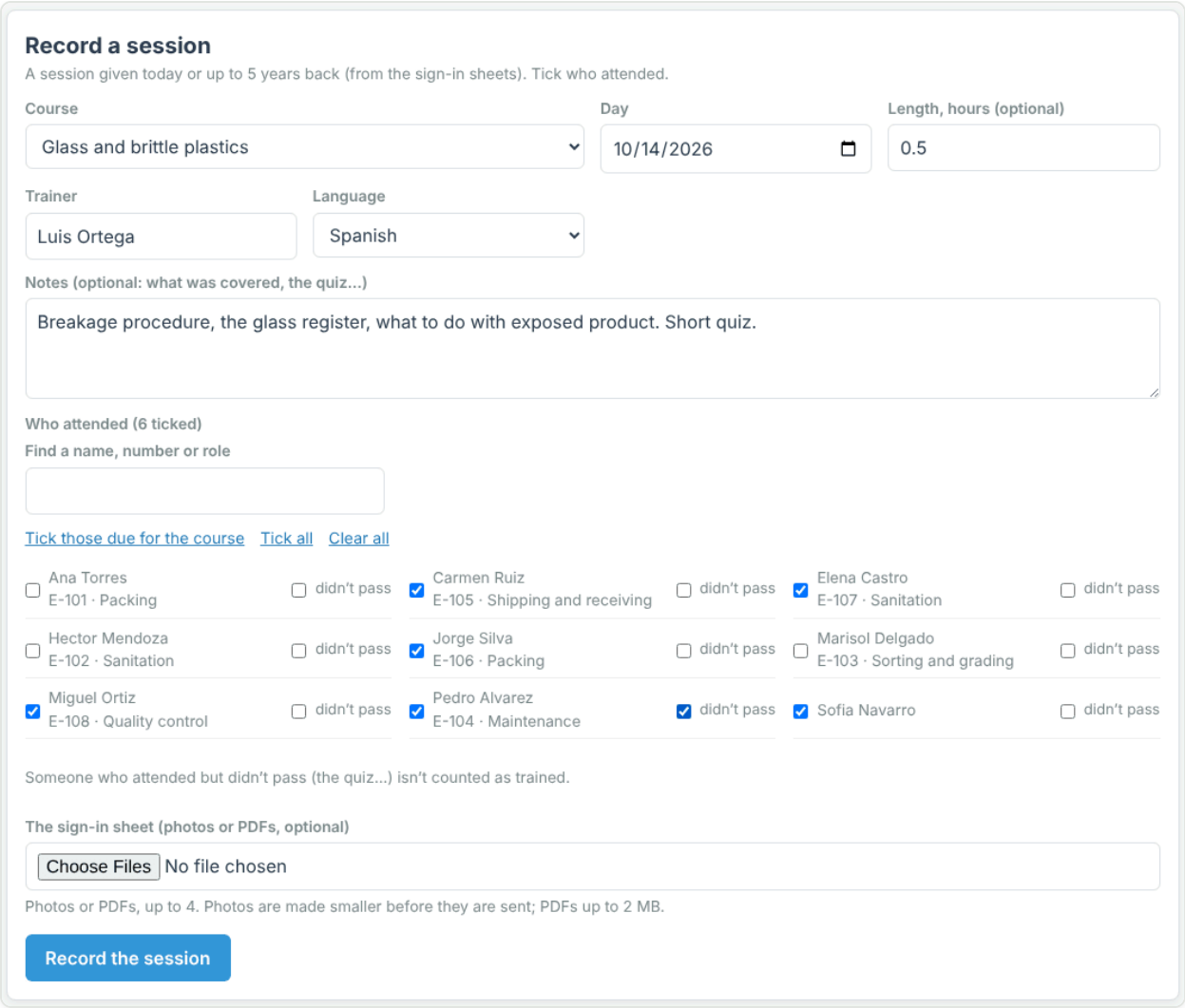


What is to do: the workers due for training, by course

A worker's state in a course: In date until the refresher is due (the last session they passed plus the course's months; a course taken once stays in date); Due soon within the Settings' days of that day; Overdue after it. Someone who never passed the course is To train until their day to take it (the day hired, or the day the course became required if later, plus the course's days), and Not trained after that, counted as overdue.

RECORDING A SESSION

1. On To do, select Record a session for these workers on the course's card: the form opens with the course and those workers ticked. Or select Record a session and choose the Course.
2. Check the Day (today, to start with; a session given earlier can be recorded from its sign-in sheet, up to 5 years back), and type the Length, hours (optional), the Trainer (those named before are offered) and, if you want, the Language and the Notes (what was covered, the quiz…).
3. Under Who attended, tick each worker who came: Tick those due for the course ticks those who aren't in date with it, Tick all ticks everyone and Clear all clears the list; with more than 8 workers, Find a name, number or role narrows it. For someone who attended but didn't pass (the quiz…), tick didn't pass: they aren't counted as trained.
4. Add the sign-in sheet (photos or PDFs, optional, up to 4), and select Record the session.



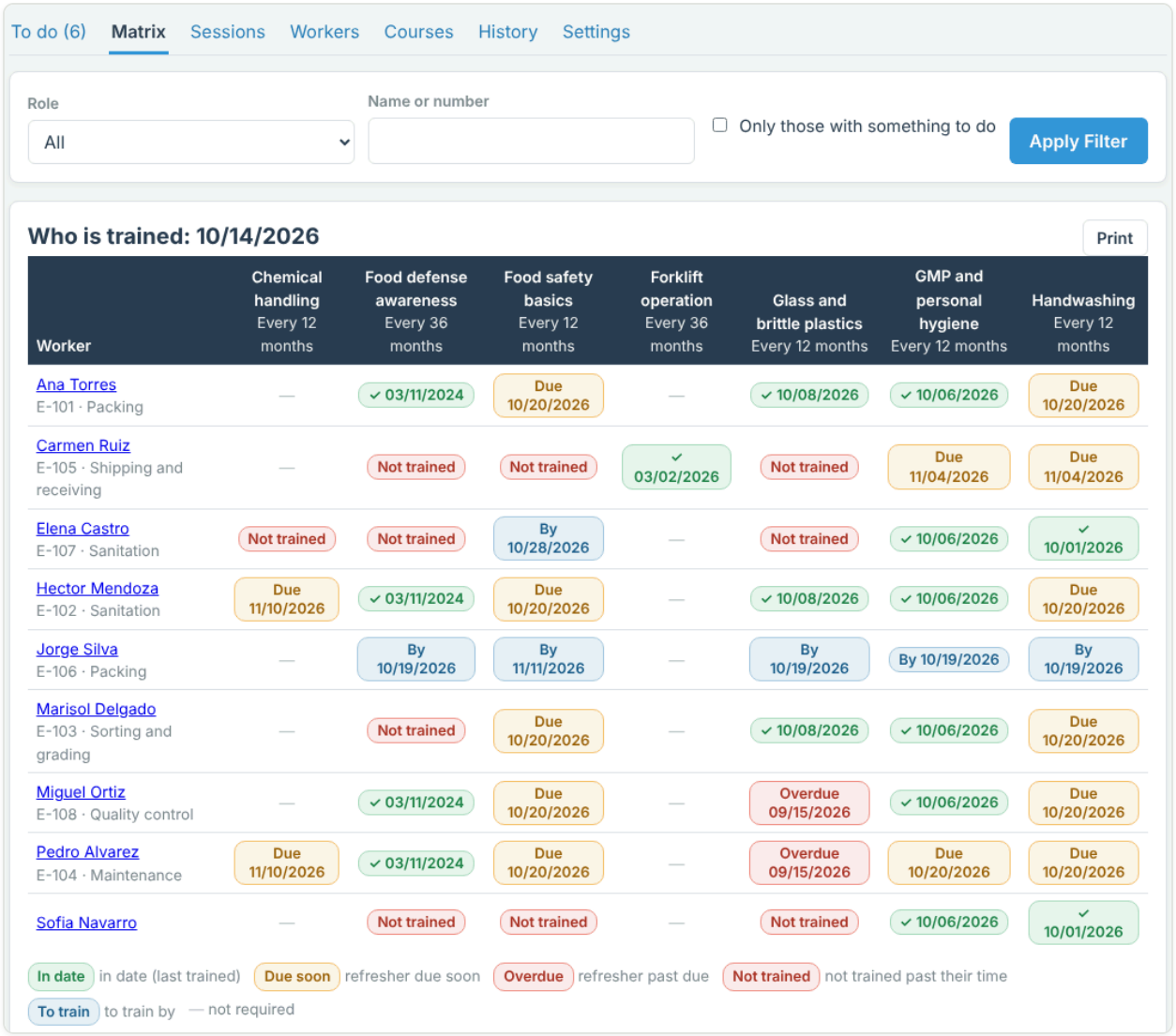
Recording a glass and brittle plastics session

Sessions lists the sessions of a period (the last year, to start with) and a course, each with its day and length, the course, the trainer and the language, how many attended (and didn't pass) and its sign-in sheet; select Apply Filter, and Print to print the list. The day opens the session: its details, Who attended with each one's result, the Sign-in sheet and files (add more with Add the files) and its history. Who recorded a session, or a Quality Control Manager, changes it with Change the session (its details and who attended; one from more than 5 years back keeps its day) and removes its files.

> **Note:** A session recorded by mistake, or under the wrong course, is voided by a Quality Control Manager with Void the session (recorded by mistake; QC Managers): type Why and select Void it. It no longer counts: its attendees are due again as if it hadn't happened.

THE MATRIX

Matrix shows every worker against the courses required at the site: ✓ with the day last trained, Due with the day, Overdue with the day it was due, Not trained, By with the day to train by, or — when the worker's role doesn't need the course. Choose a Role, type a Name or number, or tick Only those with something to do, and select Apply Filter; Print prints it. The legend under the matrix explains each mark.

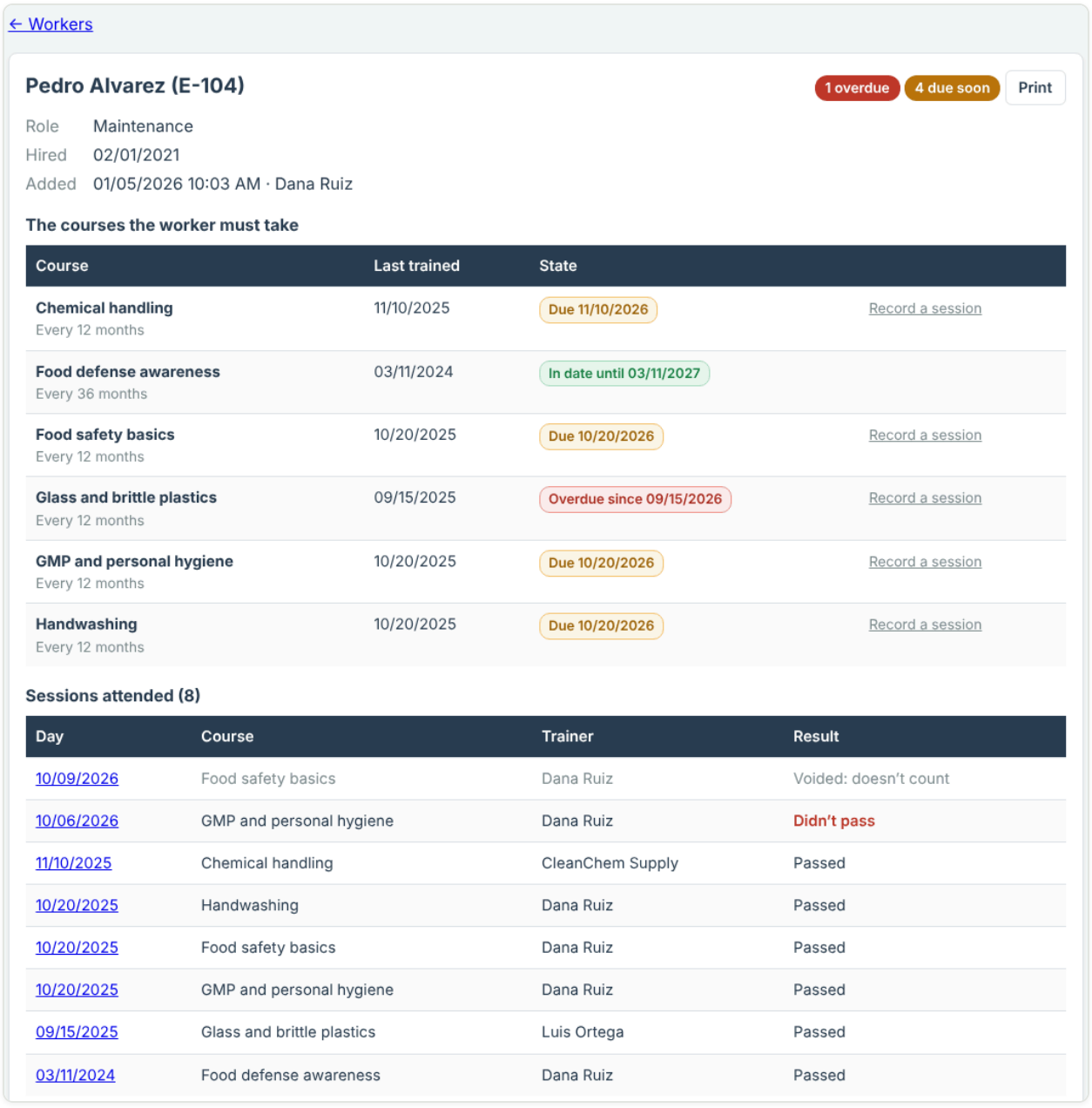


Who is trained: the matrix of the workers and the courses

WORKERS

Workers lists the site's workers with their role, the day hired and where they stand (overdue, to train, due soon, In date, or Nothing required). To add one, under Add a worker type the Name and, if there is one, the Employee number (once at a site), choose the Role or department and the day Hired on (optional: without it, the worker counts as hired before each course became required), and select Add the worker. Add several workers takes a list, one worker a line: the name, then a comma (or a tab) and the employee number, up to 100 at a time, all with the same role and day hired; if a line is wrong (a number already taken, a name too long), nothing is added and each wrong line is said.

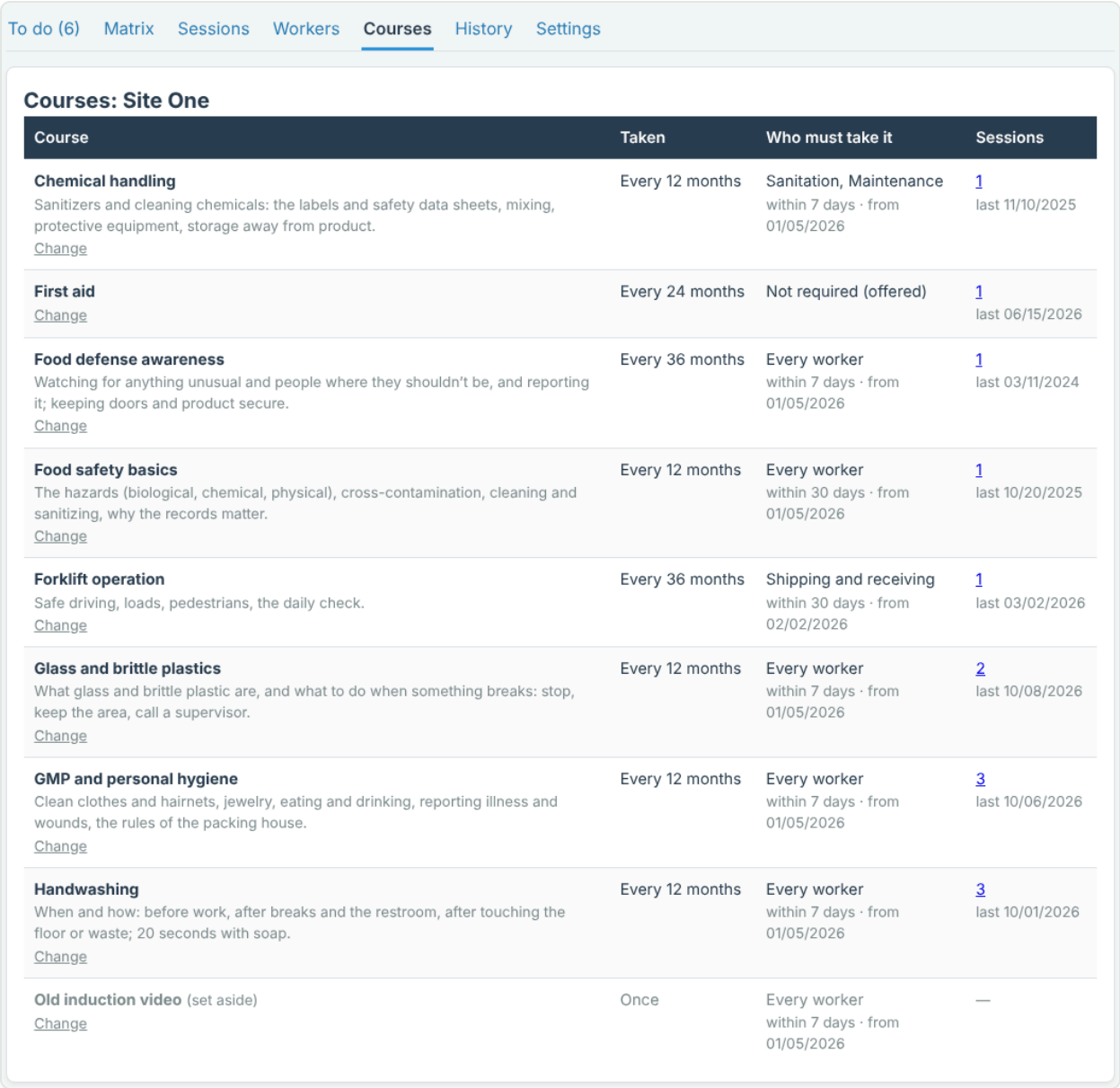
A worker’s name opens the worker: the courses they must take, each with when they were last trained and their state (Record a session opens the form for that course and worker), the Sessions attended (a voided one shows Voided: doesn’t count) and the history. Change the worker changes the name, the number, the role or the day hired; when the worker leaves, untick Still works here: they are no longer counted, and their sessions are kept (Workers lists them With those who left).



A worker’s training

COURSES AND ROLES

Courses lists the site’s courses: how often each is Taken (every so many months, or once), Who must take it (with the days to take it and the day it is required from) and its Sessions. Quality Control Managers keep them: Add a course (or Change on a course) takes its name and what it covers, Taken again every … months (0: once; up to 120), the Days to take it (7, to start with; up to 365), Required from (the day it is added, to start with) and Who must take it: Every worker, The workers of these roles (tick them), or Nobody: offered, not required. A new hire takes the course within its days of being hired; the workers already there, within its days of the day it became required. Untick In use to set a course aside: it is no longer required, and its sessions are kept. A change to a course changes who is due at once.



The courses and who must take them

Under Roles and departments, Quality Control Managers keep the site's roles: A new role and Add the role, or change a role's name and select Save; untick In use to set one aside (it can't be given to a worker any more; those who have it keep it). Each role shows how many workers have it.

> **Tip:** To start, Add the usual roles (Packing, Sorting and grading, Shipping and receiving, Sanitation, Maintenance, Quality control, Supervisor) and Add the usual courses: GMP and personal hygiene, Food safety basics, Handwashing, and Glass and brittle plastics (every worker, every 12 months), Chemical handling (the Sanitation and Maintenance roles, every 12 months) and Food defense awareness (every worker, every 36 months), required from that day, within 7 days, and, offered (not required) to whoever runs the food safety plan, PCQI (Preventive Controls Qualified Individual) at a US site or Preventive control plan (PCP) and HACCP at a Canadian one. Then change them as the site needs, and add the workers.

History lists everything done: the sessions recorded (and those recorded later from a sign-in sheet), changed and voided, the files, the workers, the courses, the roles and the settings.

> **Note:** The Settings (Quality Control Managers) hold how many days before its due day a refresher is due soon (30, to start with; 0 to 180) and whether Trend Alerts reports the workers overdue for training (on; see 6.13). How soon each course is taken is set on each course.

6.53 Field Audits

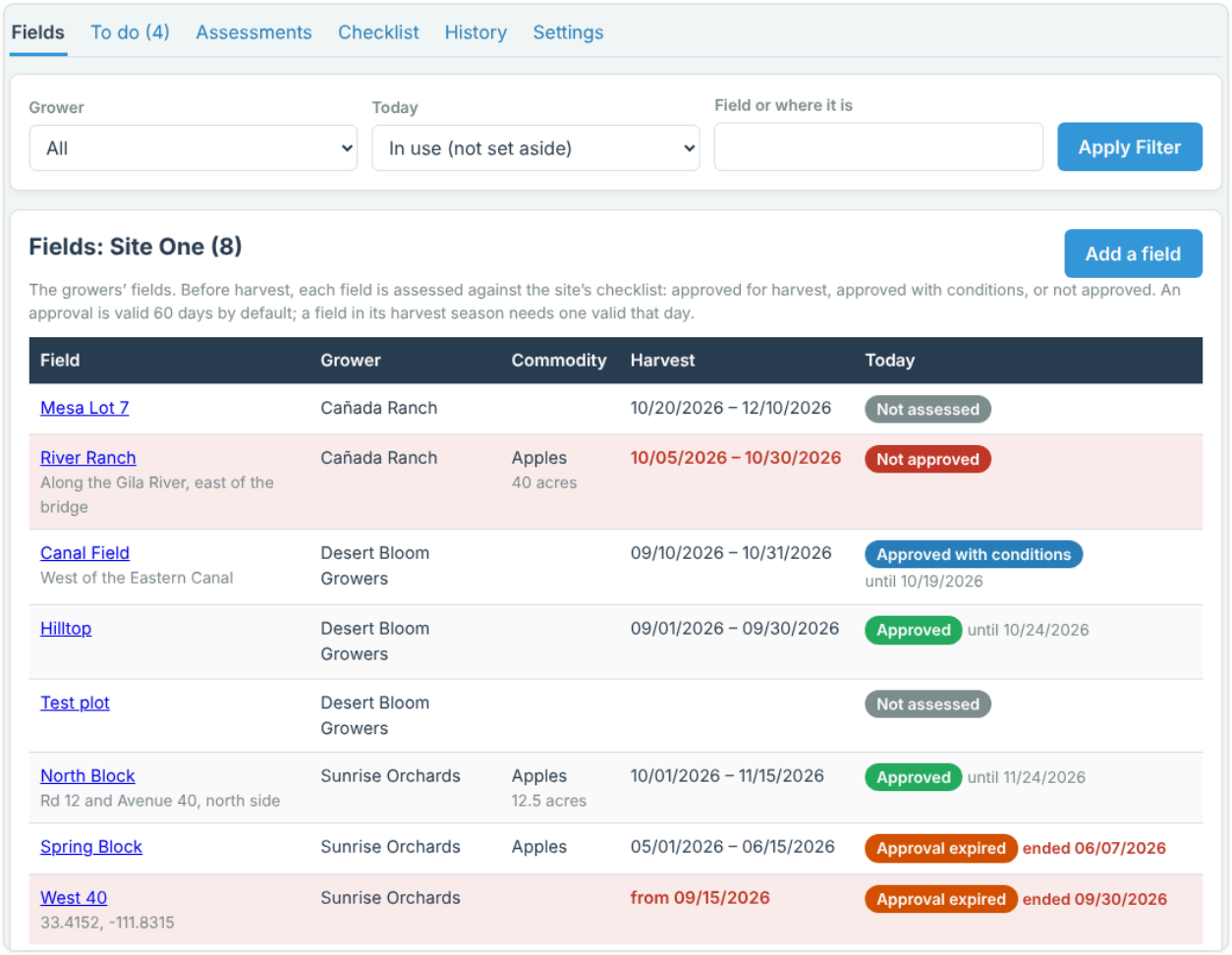
Growers > Field Audits keeps the growers' fields and their assessments before harvest. Each field (a ranch, block or lot) belongs to a grower of the site's grower list and has its harvest season; before it is harvested, it is assessed against the site's pre-harvest checklist: the land around it, animals, the water, soil amendments, the crew's hygiene, flooding and the land's previous use. The assessment approves the field for harvest, approves it with conditions or doesn't approve it, until a date; a field in its harvest season needs an approval valid that day. It is in the Growers menu, after Approved Suppliers.

> **Note:** Field Audits is not Approved Growers (see 6.21), which stays as it is: Approved Growers approves the grower; Field Audits assesses each of the grower's fields before its harvest.

Who	What they do
Everyone with the Field Audits permission	See the fields, To do, the assessments, the checklist and the history.
Users chosen in the Settings	Also add and change the fields, assess them and add photos.
Quality Control Managers	All of that, and keep the checklist and the Settings, set fields aside, void assessments and remove photos.

FIELDS

Fields, where the page opens, lists the fields in use, each with where it is, its Grower, its Commodity (and its area), its Harvest and how it stands Today: Approved or Approved with conditions until a day, Approval expired (ended a day), Not approved or Not assessed. A field in its harvest season without an approval valid today is in red. Choose a Grower or how they stand Today (or No longer used), or type part of the Field or where it is, and select Apply Filter.



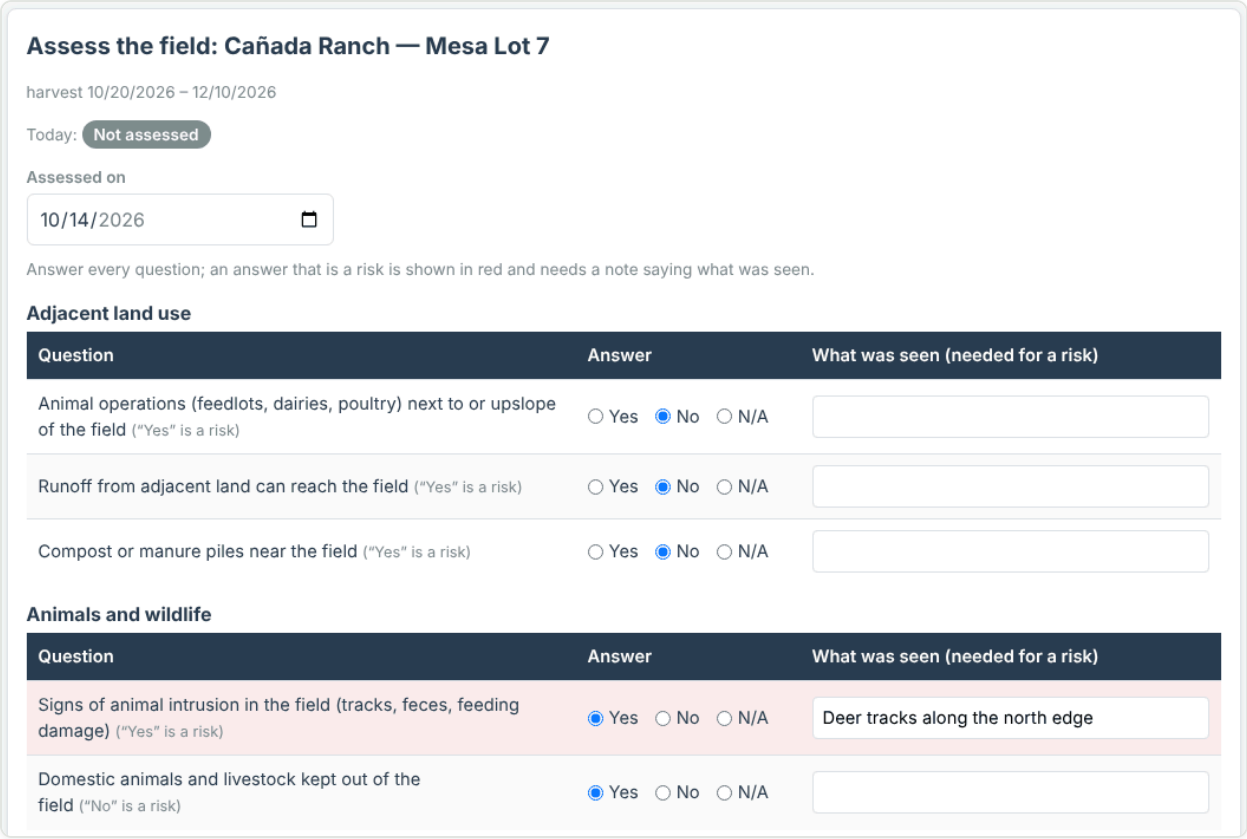
The growers' fields and how they stand today

To add a field, select Add a field: choose the Grower (one of the site's grower list), type the Field (ranch, block or lot; once for each grower) and, if you want, choose the Commodity and type the Area, in acres or hectares (hectares to start with at a Canadian site); enter Harvest from (this season) and, when known, Harvest to; type Where it is (address, description or GPS) and a Note if you want, and select Add the field. Each season, change its harvest dates with change the details on the field.

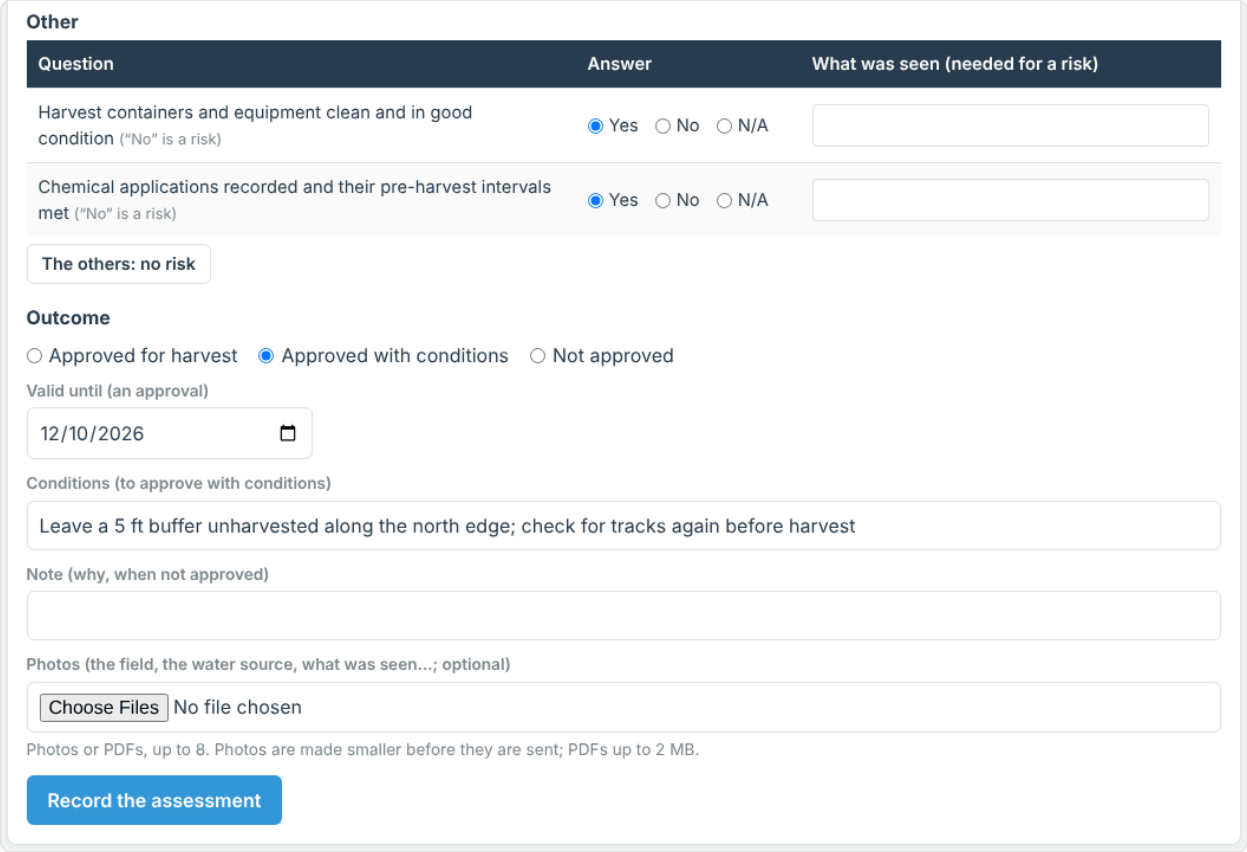
The field's name opens the field: its details (the grower opens Approved Growers, for those with that page), its harvest (in season), its latest assessment, its Assessments and its History. Assess this field opens the assessment form. A Quality Control Manager sets aside a field no longer used with No longer used (set it aside): type Why and select Set it aside. It is kept with its assessments, but no longer counted or listed to do; Use it again puts it back.

ASSESSING A FIELD

1. On the field, select Assess this field.
2. Check Assessed on (today, to start with; up to 30 days back).
3. Answer every question Yes, No or N/A. The answer that is a risk is shown after each question, such as (“Yes” is a risk): chosen, it turns the row red and needs What was seen. The others: no risk answers every question not answered yet with its answer that isn’t a risk.
4. Choose the Outcome: Approved for harvest, Approved with conditions (type the Conditions: what must be done, such as the mitigation) or Not approved (type the Note: why). Check Valid until (an approval): the day plus the Settings’ days, or the end of the field’s harvest when sooner; it can be changed, up to 365 days after the day.
5. Add the Photos (the field, the water source, what was seen...; optional, up to 8 photos or PDFs) and select Record the assessment.



Assessing a field: a risk answer needs what was seen



The end of the assessment: the outcome, until when, the conditions

> **Note:** A field with a risk answer can't be approved without conditions: approve it with conditions, saying which, or don't approve it. When something is missing, the form says what and keeps what was typed (the photos must be chosen again).

The assessment gets its number (FA-00001, numbered by site) and opens: the field, the day, who assessed it, Valid until, the Risk answers, the Conditions or Why, the Answers by group (the risks in red) and the Photos; Add the files adds more. From one not approved or approved with conditions, select Raise a corrective action (see 6.9).

← Cañada Ranch — River Ranch

Field assessment FA-00007

Not approved

Field	Cañada Ranch — River Ranch · Apples
Assessed on	10/02/2026
By	Sam Carter
Risk answers	2
Why	Runoff from the feedlot and raw manure within 12 months: not to be harvested this season

Raise a corrective action

Assess this field again

Answers (15)

Adjacent land use

Question	Answer	What was seen
Animal operations (feedlots, dairies, poultry) next to or upslope of the field	No	
Runoff from adjacent land can reach the field	Yes · risk	The feedlot to the north drains toward the field after rain
Compost or manure piles near the field	No	

Animals and wildlife

Question	Answer	What was seen
Signs of animal intrusion in the field (tracks, feces, feeding damage)	No	
Domestic animals and livestock kept out of the field	Yes	

Water

Question	Answer	What was seen
The water applied to the crop comes from a source tested and within its limits	Yes	
The water source (well, canal, reservoir) is protected from contamination	Yes	

Soil amendments

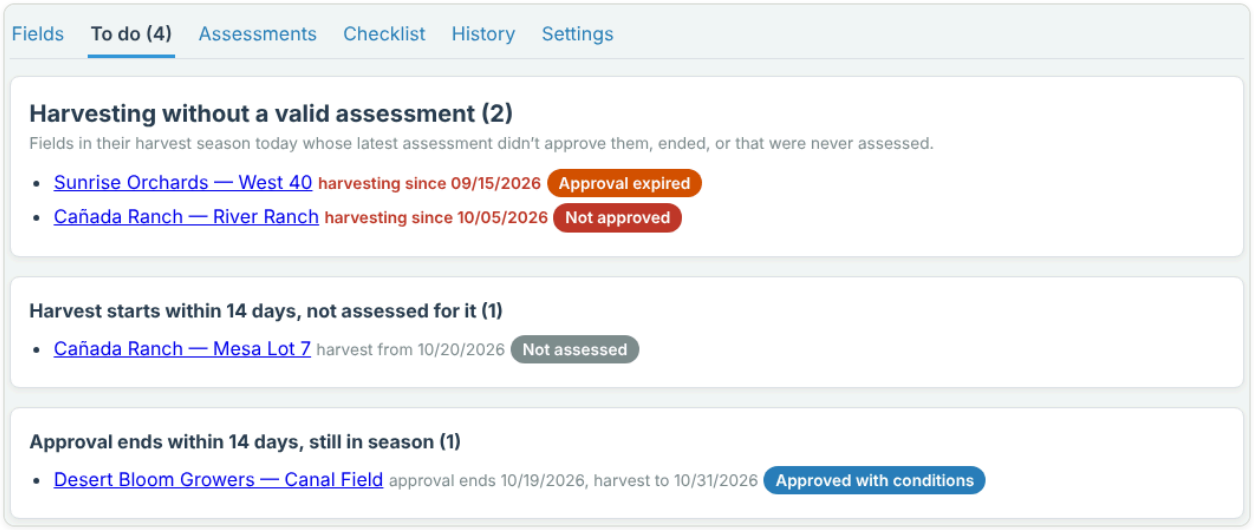
Question	Answer	What was seen
Raw manure applied to the field in the last 12 months	Yes · risk	Raw manure spread in May (the grower's records)
Composted amendments come with a certificate of treatment	Yes	

A field assessment that didn't approve the field

> **Note:** An assessment isn't changed. One recorded by mistake is voided by a Quality Control Manager with Void the assessment (recorded by mistake; QC Managers): type Why and select Void it. It no longer counts, and the field stands as it did before it; assess the field again if needed. An assessment a corrective action was raised from can't be voided.

TO DO AND ASSESSMENTS

To do lists, with their count on the tab: Harvesting without a valid assessment, the fields in their harvest season today whose latest assessment didn't approve them or ended, or that were never assessed; Harvest starts within 14 days, not assessed for it (the Settings' days); and Approval ends within 14 days, still in season. Each field opens the field. A field without harvest dates is never harvesting or due.



The fields to assess

Assessments lists the assessments of a period (the last 90 days, to start with), by Grower and Outcome (or Voided): each with its number, day and who, the field, the outcome (and its corrective action), Valid until (red when ended) and the Risks; select Apply Filter, and Print to print the list.

THE CHECKLIST

Checklist shows what is asked about each field before its harvest, in groups (Adjacent land use, Animals and wildlife, Water, Soil amendments, Worker hygiene, Flooding, Previous land use, Other), each question with the answer that is a risk: “Yes” is a risk or “No” is a risk. Quality Control Managers keep it: under Add a question, type the Question, choose the Group and The answer that is a risk, and select Add the question (up to 60). On a question, the arrows move it up or down, change changes its text, group or risk answer, and stop asking it takes it off the next assessments (Ask it again puts it back). The assessments already recorded keep the questions as they were asked.

> **Tip:** To start, select Start from the usual pre-harvest checklist: 16 questions in 8 groups (animal operations, runoff and manure piles near the field; animal intrusion and livestock; the pre-harvest water assessed (US) or tested (CanadaGAP), the harvest and post-harvest water potable, and the water source protected; raw manure and composted amendments; toilets, handwashing and the crew’s hygiene training; flooding; the land’s previous use; harvest containers and chemical applications), in your language. Then change it to what your site asks.

History lists everything done: the settings, the checklist, the fields, the assessments and voids, the photos and the corrective actions raised.

> **Note:** The Settings (Quality Control Managers) hold how many days an approval is valid (60, to start with; 1 to 365; it can be changed on each assessment), how many days ahead a harvest starting or an approval ending is due (14; 0 to 90), who keeps the fields and assesses them besides the QC Managers (the Users with the page, ticked; the others only see), and whether Trend Alerts reports the fields needing their assessment (on; see 6.13).

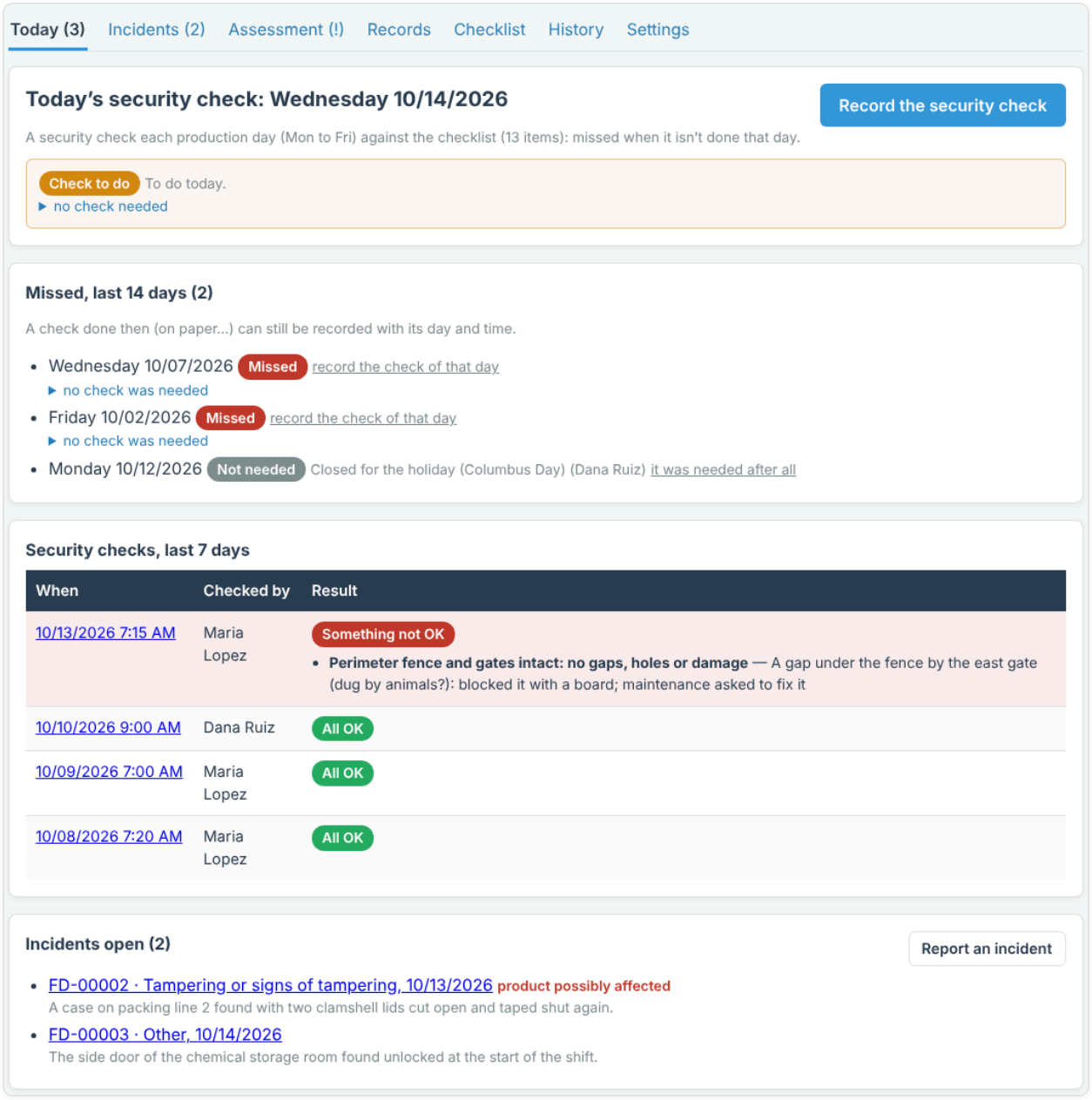
6.54 Food Defense

Management > Food Defense helps keep the product safe from someone contaminating it on purpose. A site keeps its security checklist (the fence and the gates, the doors and the chemical storage locked, the cameras, the visitor log, the trailers sealed...) and does a security check against it each production day, or once a week, as its Settings say; a check not done in its day or week is missed. Anything that could put the product at risk on purpose (a suspicious person, tampering, a break-in, a seal missing or broken, a threat) is reported as an incident. The vulnerability assessment lists where the product could be contaminated on purpose, how likely and how bad, and the controls in place, and is reviewed at least every 12 months. It is in the Management menu, under People and security, after Visitors and Contractors.

Who	What they do
Everyone with the Food Defense permission	See Today, the incidents, the assessment, the records, the checklist and the history; report incidents, and change their own while they are open.
Users chosen in the Settings	Also do the security checks.
Quality Control Managers	All of that, and keep the checklist, the assessment and the Settings, record the assessment's reviews, say a check wasn't needed, change, close, reopen and void incidents, and void checks and reviews recorded by mistake.

TODAY

Today, where the page opens, shows today's security check (or this week's, Monday to Sunday) with how it stands: Check to do, Checked or Not needed, and the checks recorded for it. Below it come the checks Missed in the last 14 days, the security checks of the last 7 days (those with something not OK marked, with what was found and done), the incidents open, and where the vulnerability assessment's review stands. The tab counts the check to do and those missed.

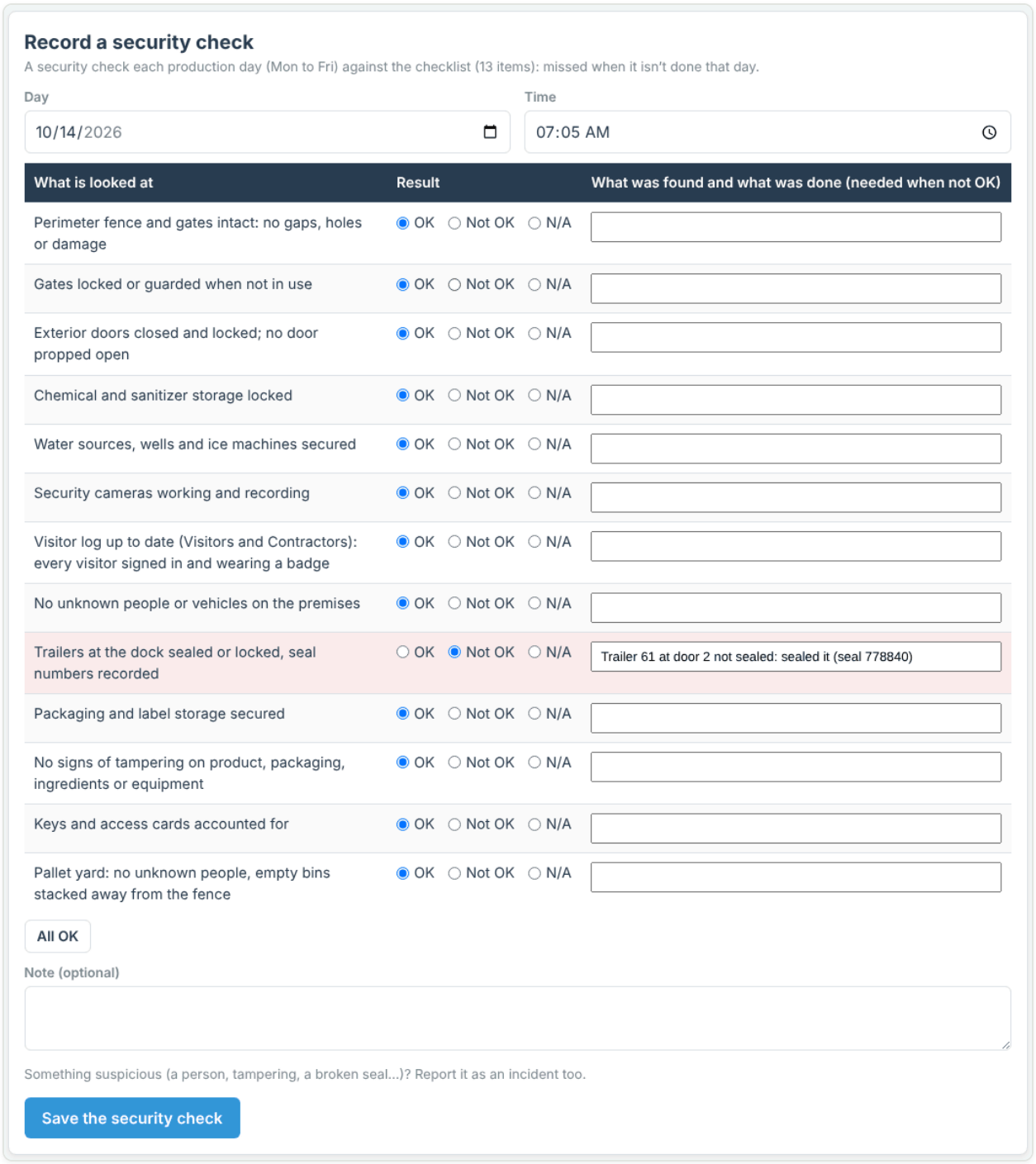


Today's security check, the checks missed and the incidents open

RECORDING A SECURITY CHECK

1. Select Record the security check.
2. Check the Day and the Time (now, to start with). A check done earlier on paper can be recorded with its day (up to 14 days back) and time, but not later than now.
3. Answer every item OK, Not OK or N/A. All OK answers OK every item not answered yet.

4. For each item Not OK, type What was found and what was done (needed), and, if you want, a Note.
5. Select Save the security check.



Recording a security check with an item not OK

The check counts for the check due that day (or that week): a day counted missed, or marked not needed, becomes Checked. A check on a day with none

due, such as a weekend walk-around, is an extra check. The check's page shows when and who, what it counts for, the items not OK and the checklist as it was answered; with something not OK, Report an incident is offered.

> **Tip:** Something suspicious found on a check (a person, tampering, a broken seal)? Report it as an incident too: the check records what was looked at, the incident what happened and what was done with the product.

Under Missed, last 14 days, record the check of that day records a check done then (on paper…). When no check was needed (the site was closed for the holiday…), a Quality Control Manager opens no check was needed under the day, types why and selects No check was needed; it was needed after all undoes it. Paused in the Settings, no check is due.

> **Note:** A security check recorded by mistake (on the wrong day, twice…) is voided by a Quality Control Manager with Void the check (recorded by mistake; QC Managers) on the check: type Why and select Void it. It no longer counts; when it was the only check of its day or week, that check is to do again, or missed once its day or week is over.

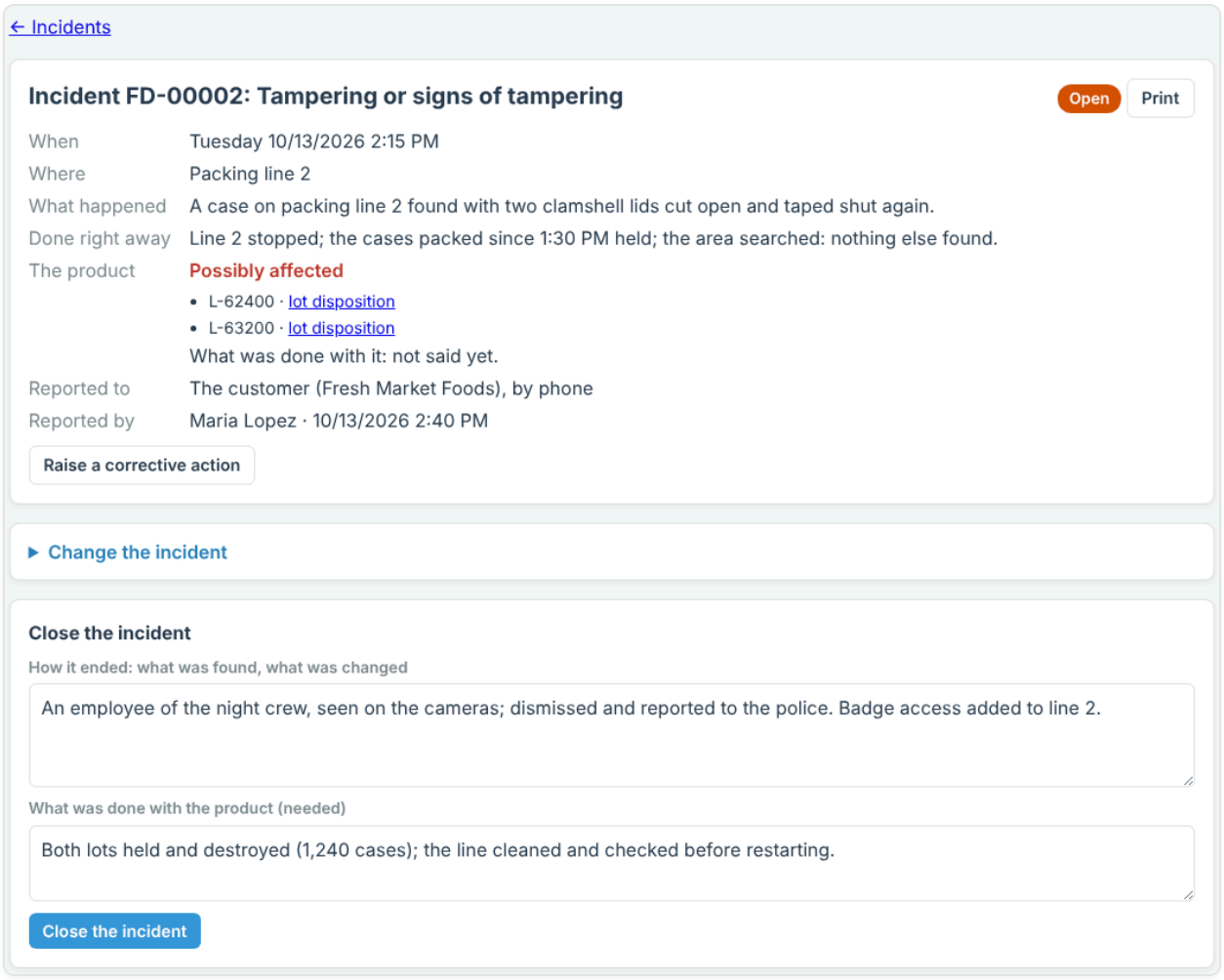
INCIDENTS

1. Select Report an incident (on Today or on Incidents).
2. Check the Day it happened (or was found), up to 90 days back, and the Time; choose What kind; and type Where, if you want, and What happened.
3. Type What was done right away. If the product was possibly affected, tick Product possibly affected and type the lots (More lots adds lines; up to 20) and What was done with the product.
4. Type Reported to (the police, the customer, the authorities…), if it was, and select Report the incident. Tell a Quality Control Manager at once.

The incident gets its number (FD-00001, numbered at each site). Its lots link to their inspections. Whoever reported it, or a Quality Control Manager, changes it while it is open (Change the incident). Once it is dealt with, a Quality Control Manager types How it ended (what was found, what was changed) and, with the

product possibly affected, What was done with the product, and selects Close the incident; Reopen the incident reopens it, saying why. Raise a corrective action starts one from the incident, with its number, kind and day only (see 6.9).

> **Note:** An incident with the product possibly affected has The regulator on its page: under Record the regulator's notice, whoever reported it (while it is open) or a Quality Control Manager records that the regulator was Told (the agency, the day and time, their reference) or that it is Not needed (say why). In Canada the CFIA must be told immediately of a food that may be a risk to health; in the United States a reportable food must be reported to FDA's Reportable Food Registry within 24 hours. Until it is recorded, the incident shows regulator not recorded on Incidents and Today, and the open incidents alert says so.

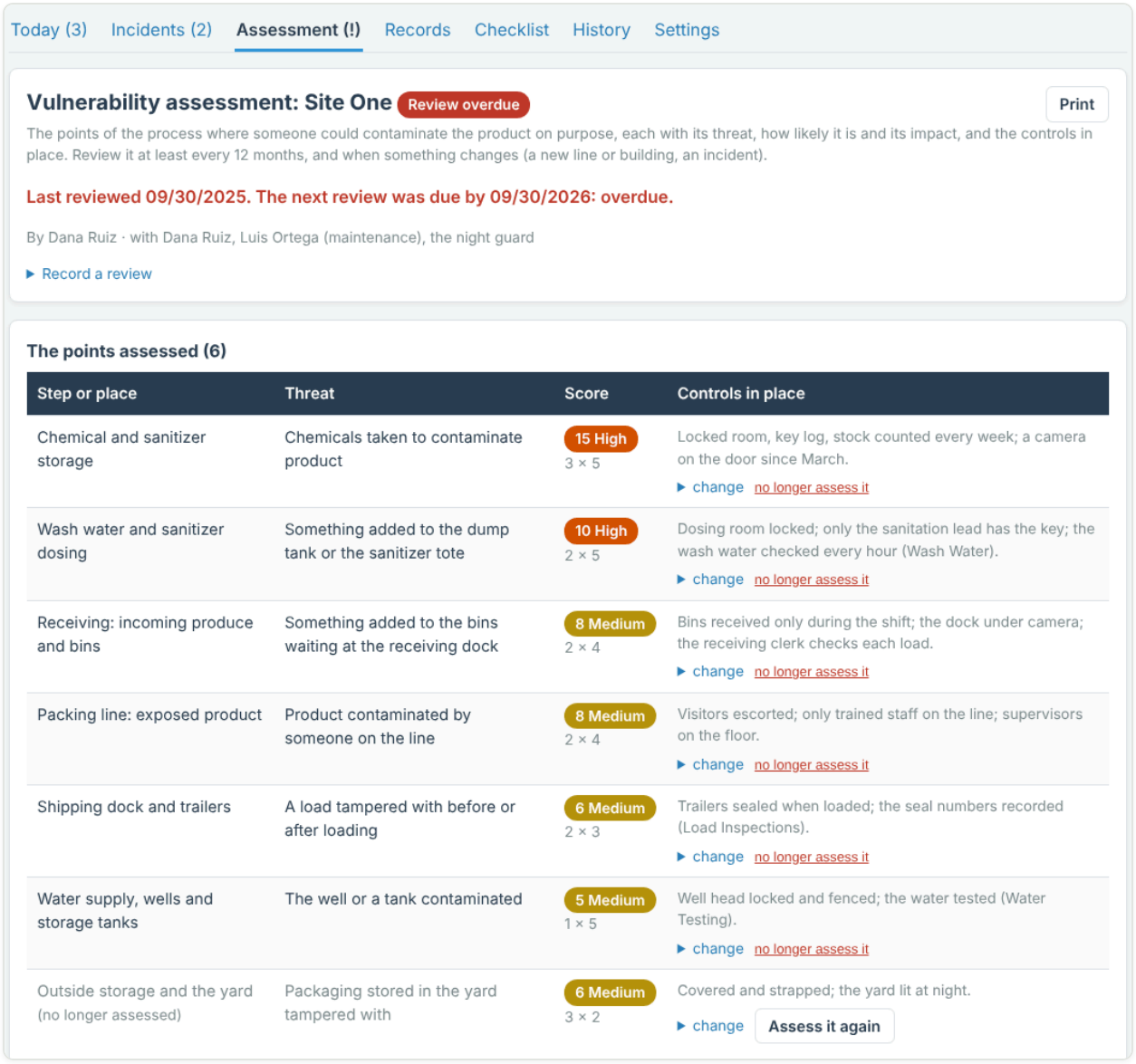


An incident with product possibly affected, to be closed

> **Note:** An incident reported by mistake, or twice, is voided by a Quality Control Manager with Void the incident (reported by mistake; QC Managers): type Why and select Void it. It no longer counts anywhere. An incident a corrective action was raised from can't be voided.

THE VULNERABILITY ASSESSMENT

Assessment lists the points of the process where someone could contaminate the product on purpose, the highest score first, each with its Step or place, the Threat, its Score and the Controls in place. The score is the likelihood times the impact (1 to 5 each), with the bands of the Risk Register (see 6.36): Low 1 to 4, Medium 5 to 9, High 10 to 16, Very high 20 to 25. A Quality Control Manager adds a point under Add a point to the assessment (the usual process steps are offered as you type), changes one (change) or stops assessing it (no longer assess it, asked first).

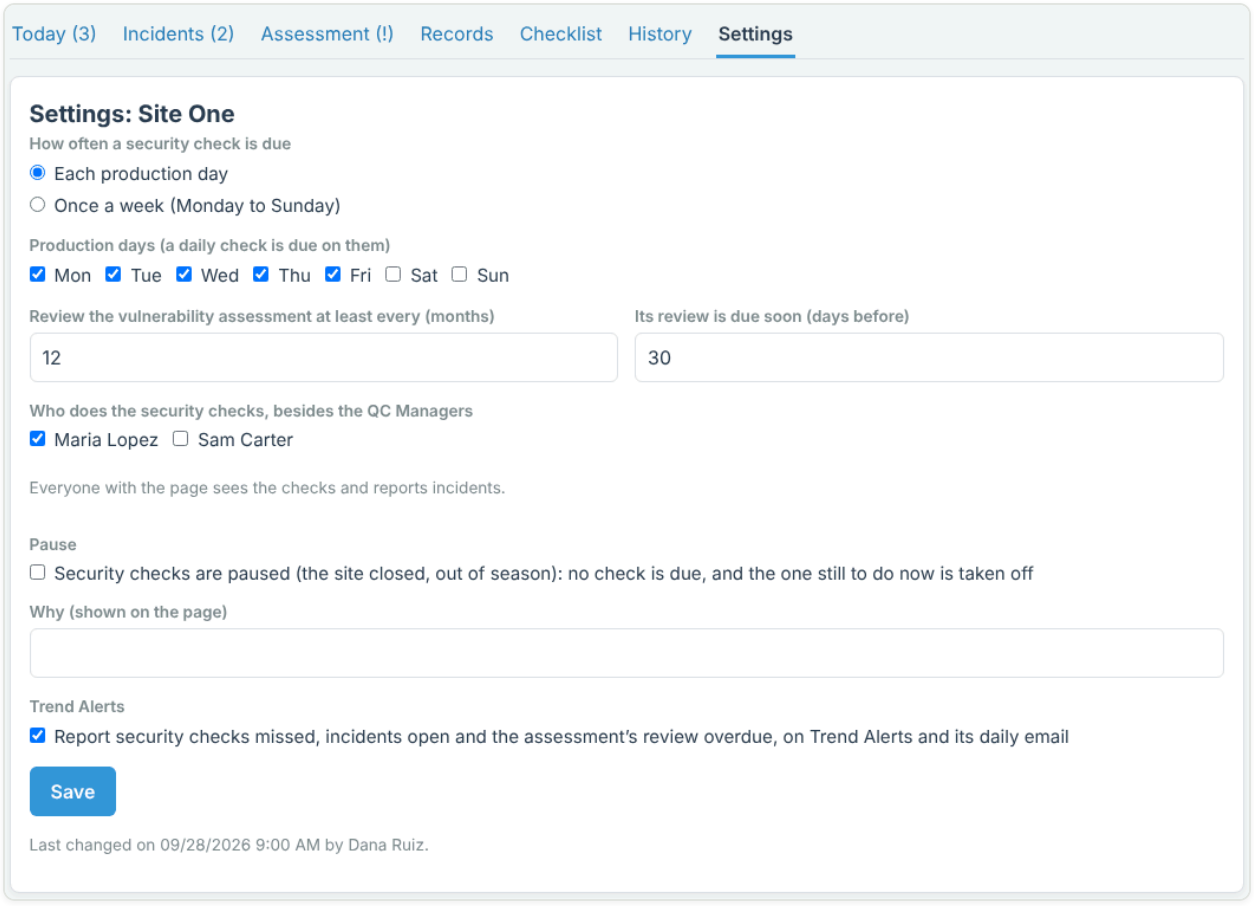


The vulnerability assessment, its review overdue

Review the assessment at least every 12 months, and when something changes (a new line or building, an incident). Once it is reviewed, a Quality Control Manager opens Record a review, checks Reviewed on (up to 60 days back, not before the last review), types the Next review by (empty: 12 months later), Who took part and What was looked at, what was changed, and selects Record the review. The review keeps the points as they are then (shown under it, in The reviews). The review is due soon 30 days before its date, and overdue in red after it; the tab shows (!) then.

> **Note:** A review recorded by mistake is voided by a Quality Control Manager: under it, in The reviews, open void it (recorded by mistake), type why and select Void the review. The review before it is the last again.

Records lists the Security checks between two dates (the last 30 days to start with; all, those with Something not OK, or those Voided), The checks due (done, missed, not needed) or the Incidents: select Apply Filter, and Print to print the list. Checklist holds what each check looks at: a Quality Control Manager starts from the usual security checklist (13 items), adds an item, changes one (checks already recorded keep it as it was), moves it up or down, or stops checking it (asked first). History lists everything done.



The settings of Food Defense

> **Note:** The Settings (Quality Control Managers) say how often a security check is due (Each production day, or Once a week (Monday to Sunday)) and the production days (Monday to Friday, to start with); how often the vulnerability assessment is reviewed (every 12 months) and how many days before its review is due soon (30); who does the security checks besides the Quality Control Managers (the site's Users with the page); Pause, when the site is closed (out of season: no check is due), saying why; and whether Trend Alerts reports the checks missed, the incidents open and the review overdue (on; see 6.13).

6.55 Importing Sites, Growers and Users

Import Sites, Growers and Users (gear > Sites) sets up many sites at once from spreadsheet files: first the sites, then the growers on each site's grower list, then the Users and Quality Control Managers who work there; and the sites' customers, varieties, packaging and sizes. Each file is checked row by row before anything is imported, and the page shows what will be done with each row. Rows that are already there are left as they are, so a corrected file can be checked and imported again. New users get a temporary password, shown once. The page is on the Settings (gear) menu of the system administrators, under Sites, after Site Groups (see 6.56).

Who	What they do
System administrators	Download the templates, check files, import them or put them aside, and see the History.
Users and Quality Control Managers added by an import	Sign in with their username and temporary password, and choose a new password at once.

Quality Control Managers and Users don't have the page.

PREPARING THE FILES

There are five kinds of file. The first three are done in this order: Sites, then Growers (added to the sites' grower lists), then Users and QC Managers. Customers and Varieties, packaging and sizes add to the sites that are already there (see The Customers File and The Varieties, Packaging and Sizes File, below).

1. Go to gear > Sites > Import Sites, Growers and Users.
2. Under 1. What the file holds, choose Sites, Growers, Users and QC Managers, Customers, or Varieties, packaging and sizes. 2. The columns then lists the columns of that kind of file and what goes in each.
3. Select Download the template (Download the template: Sites, for example): a CSV file with the column headers in your language.
4. Open it in Excel, fill in one row per site, grower or person, and save it with File > Save As > CSV UTF-8.



The Import tab: the kinds of file, the columns of a sites file and the choices

- The first row holds the column headers, as in the template, in English or Spanish; capitals, accents and the order of the columns don't matter. Columns

not recognized are listed as not used.

- The columns can be separated by commas, semicolons or tabs. A file saved as CSV UTF-8, or as CSV from Excel on Windows, keeps its accents.
- Where a cell holds several names (sites, site groups, commodities), separate them with semicolons: Site One; Site Two. Names are matched without regard to capitals or extra spaces.
- A file has at most 2000 rows and 1 MB (1024 KB). Empty rows are skipped.

> **Note:** An Excel workbook (.xlsx) isn't read: Choose a CSV file (in Excel: File > Save As > CSV UTF-8). A workbook only renamed .csv gets This is not a CSV file. In Excel, save it with File > Save As > CSV UTF-8.

THE SITES FILE

One row per new site. A site whose name is already used (capitals and spaces aside) is skipped and left as it is.

Column	What goes in it
Site name	Required (up to 100 characters): the site's name as it shows everywhere.
Address, City, State / province, ZIP / postal code, Phone	Optional: the site's address and phone, as on Add / Change Sites (3.1).
Country	Optional: the site's Country on Add / Change Sites, such as United States, Canada or Mexico. A site in Canada follows Canada's rules on the QA pages (see 6.32).
Time zone	A time zone as listed on Add / Change Sites, such as America/Phoenix or America/Toronto. Empty: the one chosen under Time zone for rows that leave it empty (to start with, the zone most sites have).
Site groups	Optional: the groups to put the site in, separated by semicolons. A name that isn't a group yet makes a new group (see 6.56).

Set each new site up from the templates (ticked to start with) does for each new site what Template Options does on Add / Change Sites (see 3.1): it gives the site the fresh produce inspection templates. It can still be changed on the next page, before importing.

> **Note:** The new sites can't take the company past the sites its licence allows (inactive sites count too). When a file would, the check says so above the rows (Your licence allows 120 sites. There are 118, and this file adds 5.) and nothing in it can be imported: import fewer sites, or ask Continuum support about the licence. The count is made again at import time: Your licence doesn't allow that many sites now: nothing was imported.

> **Note:** New sites start as QC sites, with the settings Add / Change Sites gives a new site; after the import the page says so: New sites start as QC: ask Continuum support to give them QA (see A.1). Set up each new site's logo, email account and settings on their own pages, as for a site added by hand (3.2, 3.5).

THE GROWERS FILE

One row per grower. The grower is added to the grower list of each site named: the list of the site's Grower question at the top of an inspection (General > Add / Change Header / Footer Questions, 5.2).

Column	What goes in it
Grower	Required (up to 100 characters): the name on the grower list.
Name in Spanish	Optional: the name shown to those who work in Spanish.
Sites	The sites whose grower lists get the grower, separated by semicolons.
Site groups	Or every active site of these groups. Give at least one site or one group.

- A grower already on a site's list (capitals and spaces aside) is left as it is there: Already on the grower list of Site One: left as it is. A row whose grower is already on every list is skipped.
- A site with no grower list is a problem: Warehouse East has no grower list (the Grower header question). Give the site its Grower question first, then check the file again.

THE USERS AND QC MANAGERS FILE

One row per person. Each becomes a User, at one site, or a Quality Control Manager, at one or more sites, as on Add / Change Users and Add / Change QC Managers (see 3.3). A username already in use by anyone (a User, a Quality Control Manager, a grower user) is skipped and left as it is.

Column	What goes in it
Username	Required: 3 to 50 characters, without spaces, commas or semicolons. It is saved in lower case.
First name	Required (up to 50 characters).
Last name	Optional.
Email	Optional: where Continuum sends this person's emails.
Language	English or Spanish (empty: English): the language the person works in.
Type	Required: User or QC Manager.
Sites	A User: exactly one site. A Quality Control Manager: one or more, separated by semicolons.
Site groups	Quality Control Managers only: the groups they are responsible for. Every active site of these groups is theirs, and a site added to a group later is theirs too, from their next sign-in (see 6.56); Sites then names only their other sites. A manager with too many sites named one by one is refused: Too many sites one by one for a QC Manager (...): name a site group instead.

Column	What goes in it
Commodities	Users only: the commodities they inspect (their assigned commodities), in English or Spanish, separated by semicolons.
Same permissions as	Users only: the username of a User whose page permissions are copied. Empty: the User chosen on the page (below).
Permission set	Users only: the name of a permission set. The User's pages are then the set's, and Same permissions as isn't used (see 6.57).
Mobile app	Users only: yes or no (empty: no), as Mobile App User? on Add / Change Users.

Under 3. The file and choices, New Users whose row names no one get the permissions of offers the active Users who have pages, or Nobody: I'll set them on Add / Change User Permissions. A User with no permissions can't sign in to the website until given some (see 3.3); the check says so on their row (No permissions are copied...).

> **Note:** Quality Control Managers have every page: for them Same permissions as, Permission set, Commodities and Mobile app are left out, and the check says so. Permissions copied from a User leave out the QA pages when the new User's site has QA off.

THE CUSTOMERS FILE

One row per customer of Customer Specifications (see 6.24), copied to each site and site group the row names. A site that already has a customer with that name (capitals and spaces aside) gets it updated, not a second one; an empty cell leaves that value as it is.

Column	What goes in it
Customer	Required: the customer's name, as on Customer Specifications.
Customer number	Optional: the customer's number in your own system.

Column	What goes in it
Address	Optional: its postal address (the traceability file's "To address").
Contact / note	Optional: the contact for quality: name, email, phone.
Sites, Site groups	The sites that get a copy, separated by semicolons, or every active site of these groups. Give at least one site or group.
Active	Yes or no (no: no longer a customer). Empty: a new customer is active, an existing one stays as it is.

THE VARIETIES, PACKAGING AND SIZES FILE

One row per variety, packaging or size, copied to each site and site group the row names, as on Add / Change Varieties, Add / Change Packaging and Add / Change Sizes. One with the same English name already at a site is updated there, not added again.

Column	What goes in it
Type	Required: Variety, Packaging or Size. Packaging and sizes belong to the site (all its commodities); varieties to a commodity.
Commodity	Varieties: required, the commodity as on Show / Hide Commodities per Site, shown at each site.
Name (English), Name (Spanish)	The name in English (required) and in Spanish (empty: a new one gets the English name, an existing one keeps its own).
Sites, Site groups	As in the customers file.
Packaging, Sizes	Varieties only: the variety's packaging and sizes, separated by semicolons: the site's, or Packaging and Size rows of this file. Links are added, never removed.
Active	Yes or no (no: not shown). Empty: new ones are shown and existing ones stay as they are.

For these two kinds, the check says for each row To add at: ..., To update at: ... and Already there, nothing to change, at: ...; after the import, Added at: ... and Updated at: .... A file can make at most 50000 copies (rows times their sites): The rows of this file make N copies (each row once per site): at most 50000 at once. Split the file into smaller ones.

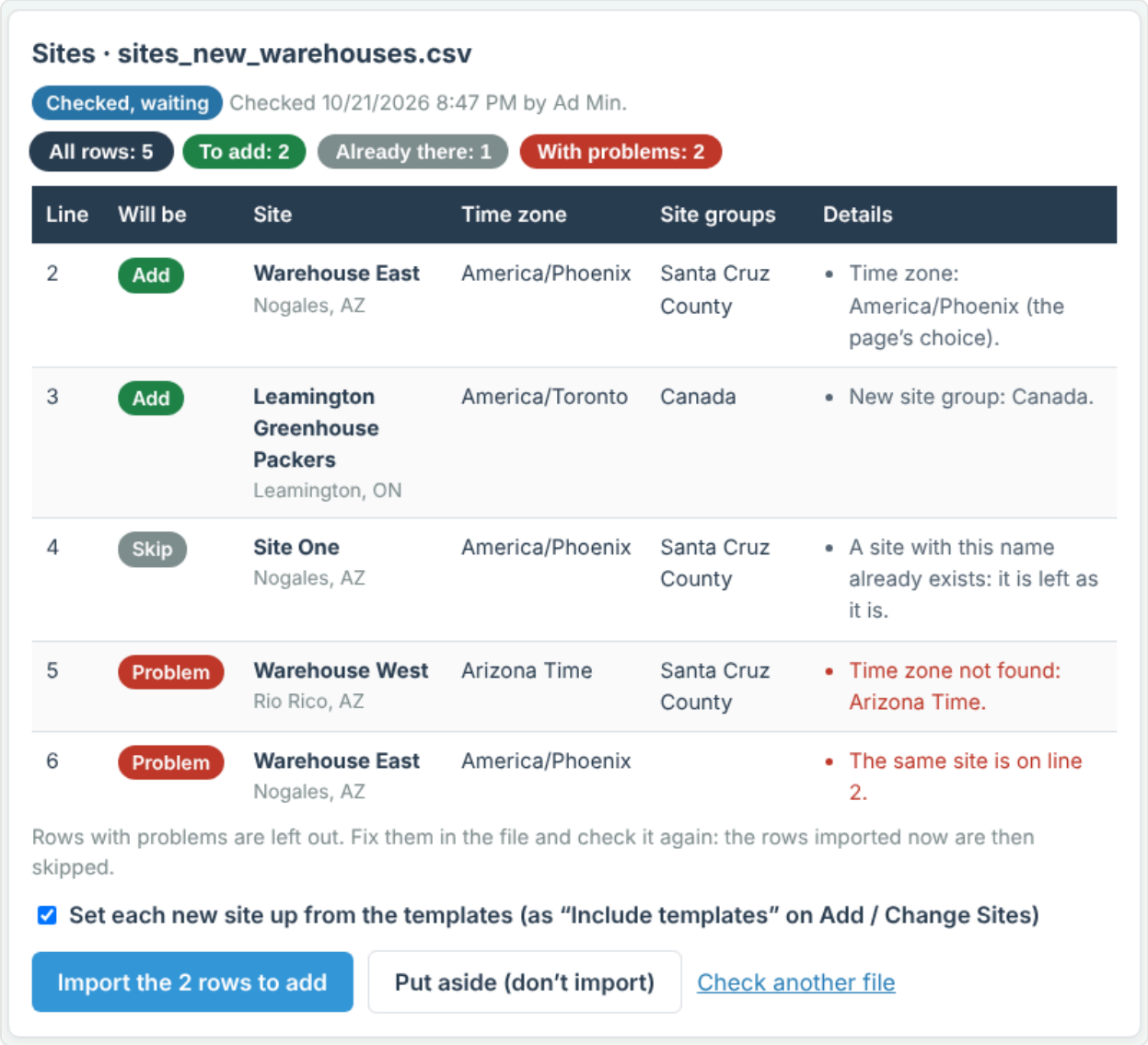
> **Note:** Customers can be added at a site with QA off: they are used once the site has QA, and the check says so (QA is off at ...: the customers there are used once the site has QA). Customers of one site can also be imported on Customer Specifications, with Import customers (see 6.70).

CHECKING A FILE

1. Under 1. What the file holds, choose the kind of file.
2. Under 3. The file and choices, choose the CSV file, and the choices of that kind of file (see above).
3. Select Check the file. Nothing is imported yet.

The next page shows the file, Checked, waiting, with every row and, under Will be, what will be done with it:

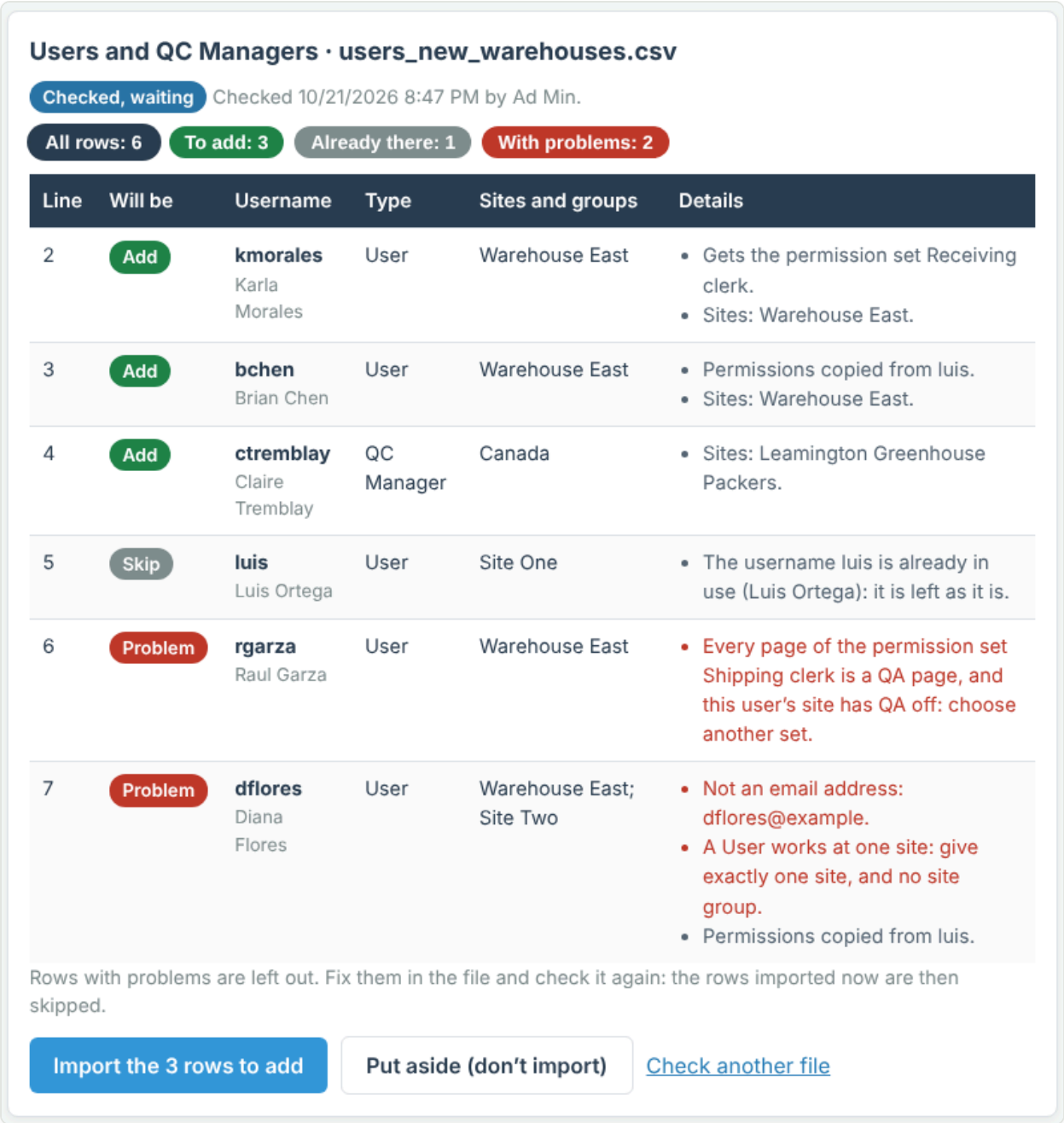
- Add: the row will be added. Its Details say how (Time zone: America/Phoenix (the page's choice)., New site group: Canada., Added to the grower list of Site Two., Permissions copied from luis.).
- Skip: it is already there and is left as it is (A site with this name already exists: it is left as it is.).
- Problem: something to fix, in red (Time zone not found: Arizona Time., The same site is on line 2., Not an email address: dflores@example.). A row with a problem isn't imported.



A sites file checked: what will be done with each row

Line is the row's line in the file (the headers are line 1). The badges above the rows (All rows, To add, Already there, With problems) count them; select one to see only those rows. A problem with the whole file, such as the licence or more than 2000 rows, is shown above the rows: nothing can be imported until the file is fixed. A file without a required column isn't kept: The file has no "Site name" column. Its first row must be the column headers, as in the template.

For a users file, the Details also say the sites each person gets and where a User's pages come from (Permissions copied from luis., Gets the permission set Receiving clerk.).



A users file checked: three people to add, one already there, two with problems

IMPORTING

1. Look through the rows. For a sites file, Set each new site up from the templates can still be changed.
2. Select Import the 2 rows to add (the button says how many). Or select Put aside (don't import) to leave the file without importing anything: The file was put aside: nothing was imported.

Each row to add is checked again as it is imported, in case someone added the same site, grower or user since the check: such a row is skipped. The page then says Imported. Each row's outcome is below. (after a users file that added people, Sign-in details of the new users is shown instead: see Temporary Passwords), and each row's Outcome is Added, Skipped or Not imported, with its details (Added., Set up from the templates., Gets the permission set Receiving clerk.); the badges All, Added, Skipped and Not imported show those rows only. Print prints the page.

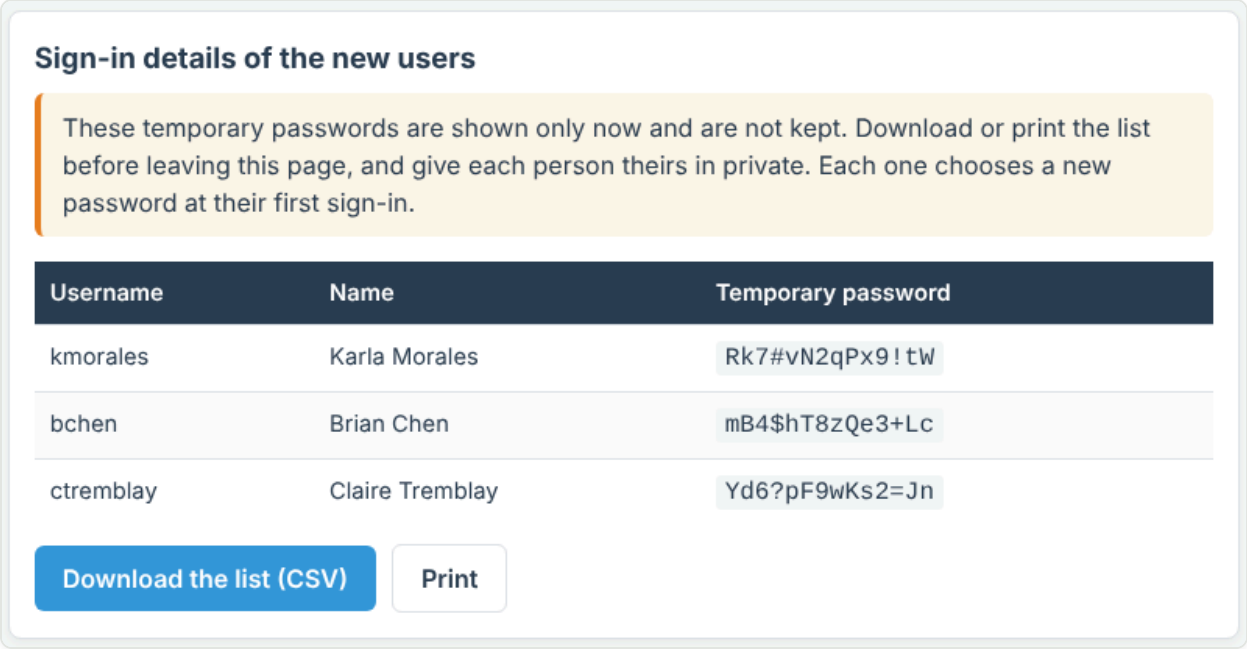
Rows with problems are left out. Fix them in the file and check it again: the rows already imported are then skipped, and only the fixed ones are added.

> **Note:** A file is imported once: importing it again (from another window, say) does nothing more: This file was already imported or put aside: nothing more was done. A file left Checked, waiting can be opened from History and imported or put aside later. A large users file can take a few minutes: wait for the page.

TEMPORARY PASSWORDS

When a users file adds people, the page opens with Sign-in details of the new users above the rows: each new person's Username, Name and Temporary password. The passwords are made at import time: at least 14 characters of capitals, small letters, digits and symbols (longer when the site's password rules ask for more; see 3.2).

- They are shown only now and are never kept in readable form, not even in the History. Leaving the page or reloading it shows the import without them.
- Before leaving the page, select Download the list (CSV) (a file new_users_sign_in.csv, made in your browser) or Print, and give each person theirs in private.
- At their first sign-in, each person must choose a new password, following the site's password rules (3.2), before they can open any page.

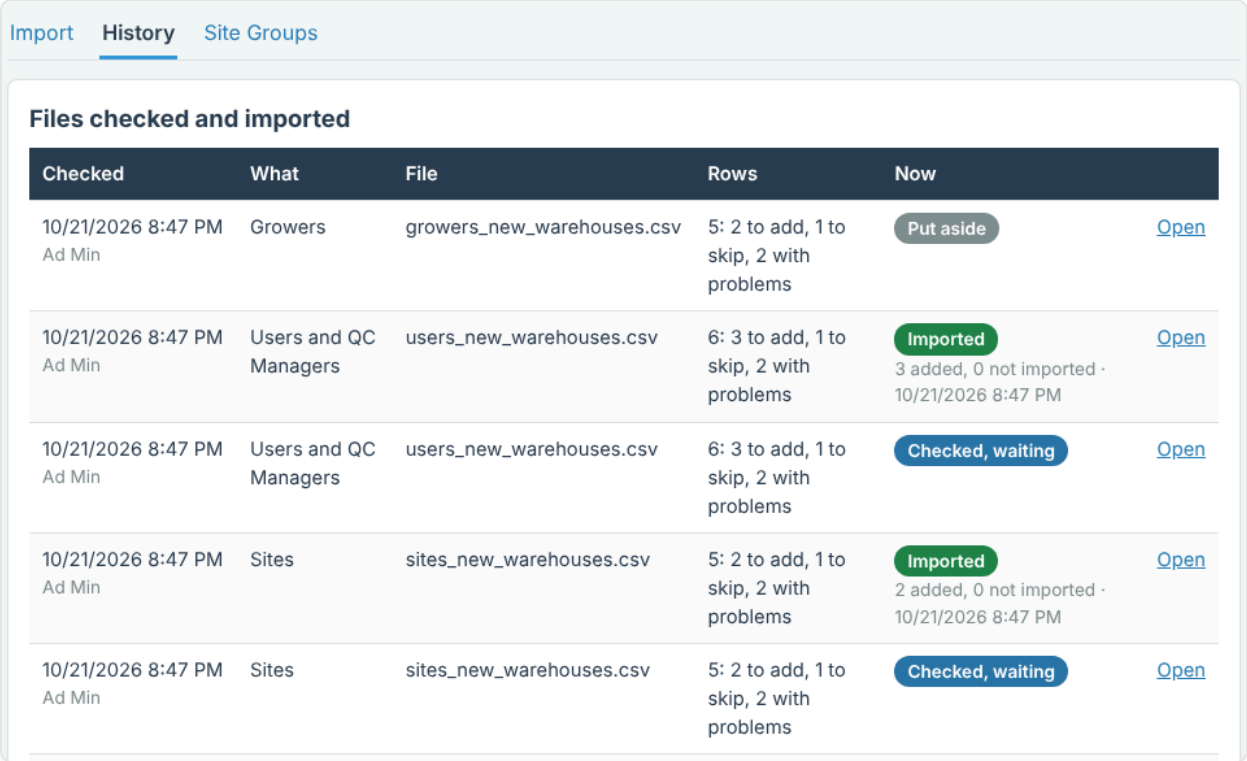


The temporary passwords of the new users, shown once

> **Tip:** The list was lost before it was handed out? Give the person a new password on Add / Change Users (with User must change password at next log-in) or on Add / Change QC Managers (3.3).

HISTORY

History lists the files checked, the newest first (the last 100): when each was Checked and by whom, What it held, the File's name, its Rows (6: 3 to add, 1 to skip, 2 with problems) and where it is Now: Checked, waiting, Imported (with how many rows were added and not imported, and when) or Put aside. Open shows the file's rows as checked and, once imported, each row's outcome, with who checked and imported it and when.



The files checked: imported, waiting and put aside

6.56 Site Groups

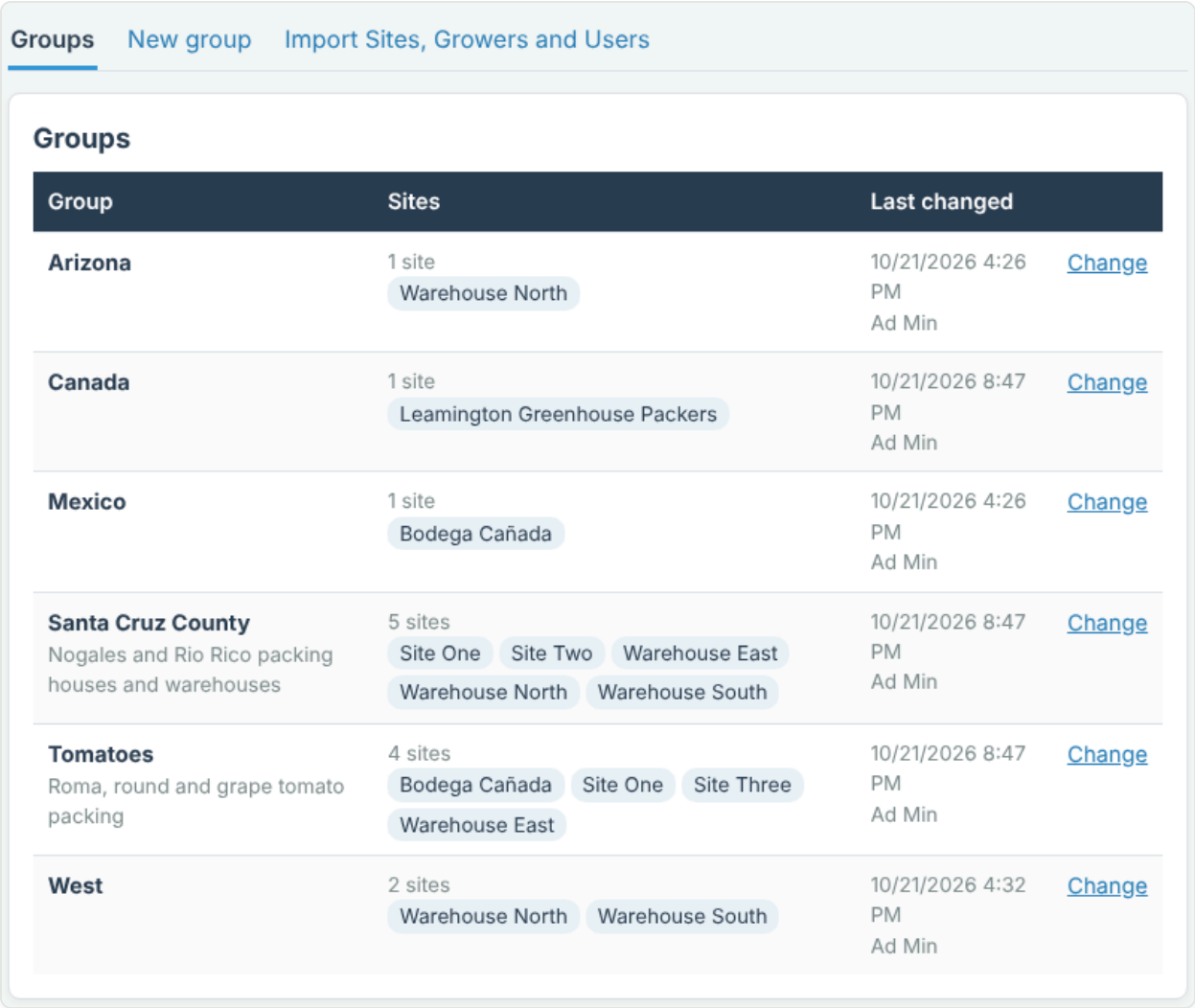
Site Groups (gear > Sites) names groups of sites, such as a region, a commodity or a customer's warehouses, so that many sites can be handled together. A site can be in several groups. A Quality Control Manager can be responsible for a group: every active site in it is theirs (see A QC Manager Responsible for a Group, below). The overview pages, Cross-site Reports and the daily digest offer each group in their Site lists (see 6.68); Company Overview shows one group at a time (see 6.59); the import puts new sites in groups (see 6.55); and Permission Sets, Site Setup and Agency Connections choose sites by group (see 6.57, 6.58 and 6.63). The page is on the Settings (gear) menu of the system administrators, under Sites, before Import Sites, Growers and Users.

Who	What they do
System administrators	Make, change and delete the groups, and see their history.

Who	What they do
Everyone with several sites	Choose a group in the Site lists of the overview pages, Cross-site Reports and the daily digest (see 6.68, 6.69), and on Company Overview, Permission Sets, Site Setup and Agency Connections (see 6.57, 6.58, 6.59 and 6.63).
Quality Control Managers responsible for a group	Have every active site of the group, as it is at their sign-in.

GROUPS

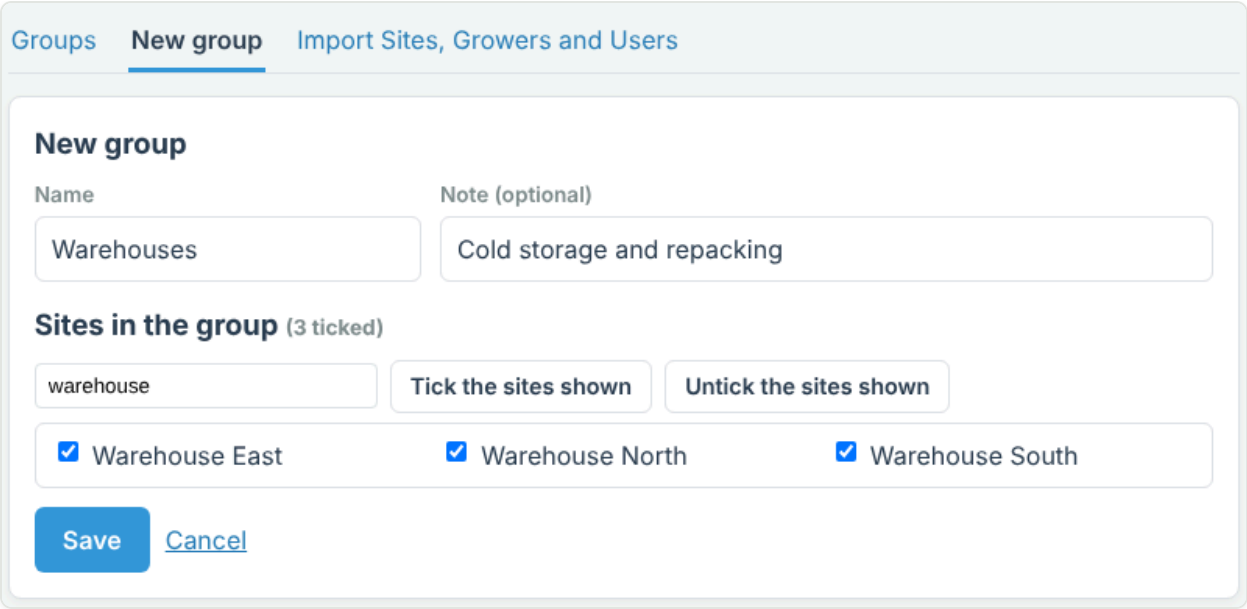
Groups, where the page opens, lists the groups by name, each with its note, how many sites it has and their names (an inactive site in grey), and when it was Last changed and by whom. Change opens a group.



The site groups and their sites

MAKING A GROUP

1. Select New group.
2. Type its Name (up to 100 characters, not used by another group) and, if you want, a Note (optional) (up to 300 characters).
3. Under Sites in the group, tick its sites. Find a site shows only the sites whose name has what you type; Tick the sites shown and Untick the sites shown tick or untick all of those at once. How many are ticked shows next to the heading.
4. Select Save: The group was created.



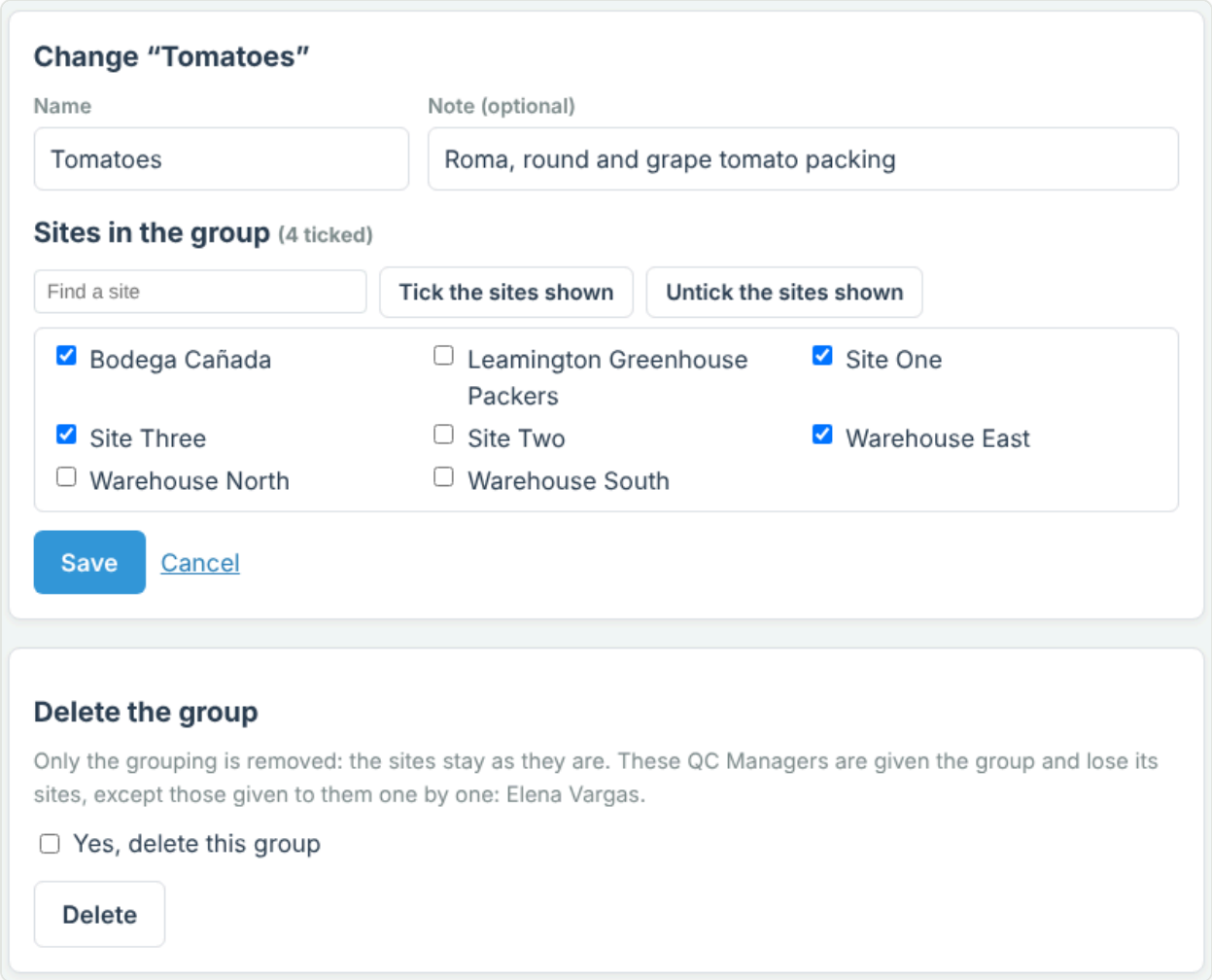
A new group, its sites found with Find a site

> **Tip:** A sites file can also put each new site in its groups, and makes the groups it names that don't exist yet (see 6.55).

CHANGING OR DELETING A GROUP

Change on a group opens it: change its Name, its Note or its sites, and select Save: The group was saved. (Nothing was changed. when nothing was). If another administrator saved the group after you opened it, your change isn't saved: Someone else changed this group first: look at it again.

To delete a group, under Delete the group, tick Yes, delete this group and select Delete: The group was deleted. Its sites are as they were. Only the grouping is removed: the sites stay as they are. If Quality Control Managers are responsible for the group, the card names them: These QC Managers are given the group and lose its sites, except those given to them one by one: followed by their names. Deleting the group also takes it away from them: from their next sign-in they no longer have its sites, except those ticked for them one by one.



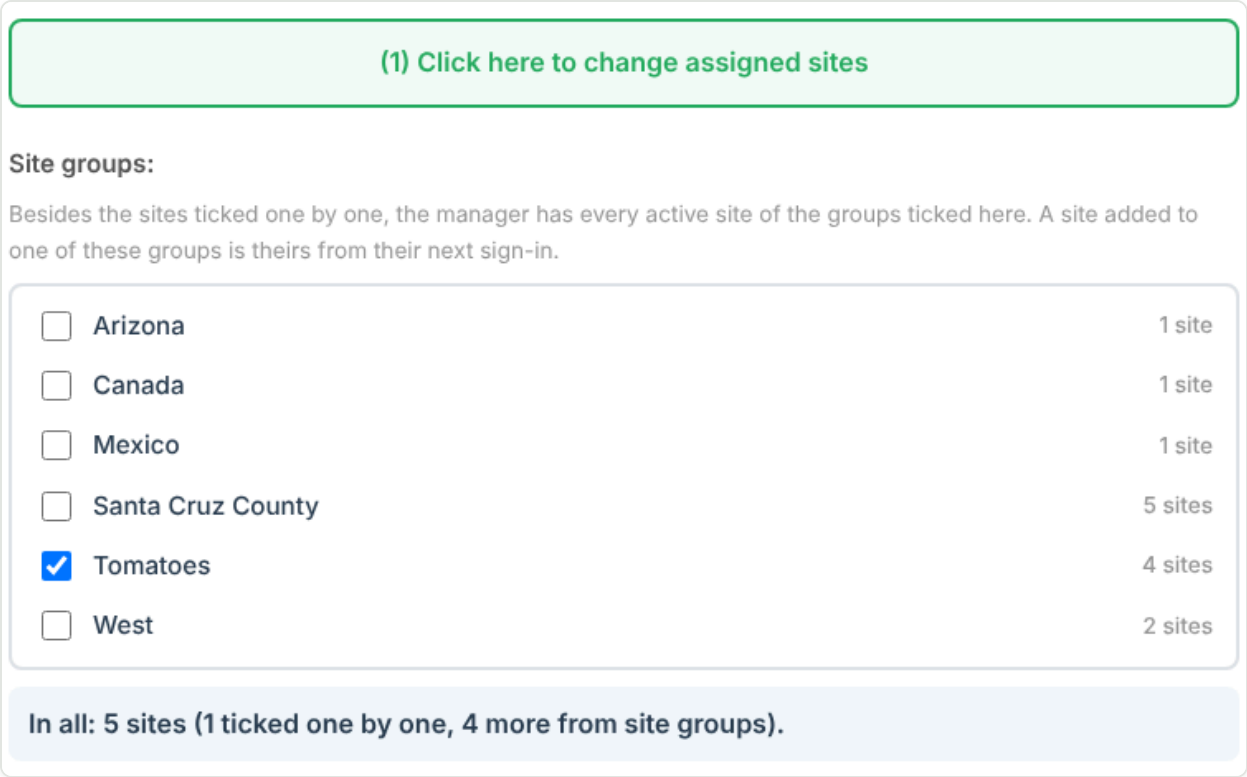
Changing a group, and deleting it

> **Note:** A site added to a group is the site of the Quality Control Managers responsible for the group from their next sign-in, and a site taken out of it is no longer theirs then (see A QC Manager Responsible for a Group, below).

A QC MANAGER RESPONSIBLE FOR A GROUP

A Quality Control Manager of many sites is given site groups rather than each site: every active site of their groups is theirs, as the groups are at their sign-in. A site added to one of the groups is theirs from their next sign-in; a site taken out of the group, or a group deleted, takes those sites away then, except the sites ticked for them one by one. System administrators give the groups on gear > Users > Add / Change QC Managers:

1. Choose the manager in Select User, or Create new user.
2. Under Site groups, tick the groups (with more than 8 groups, Find a group finds one). In all: 5 sites (1 ticked one by one, 4 more from site groups) says how many sites that makes.
3. If you want, also tick sites one by one in Assigned Sites, where the sites of the groups ticked show in a ticked group.
4. Select Save changes. The manager has the new sites from their next sign-in.

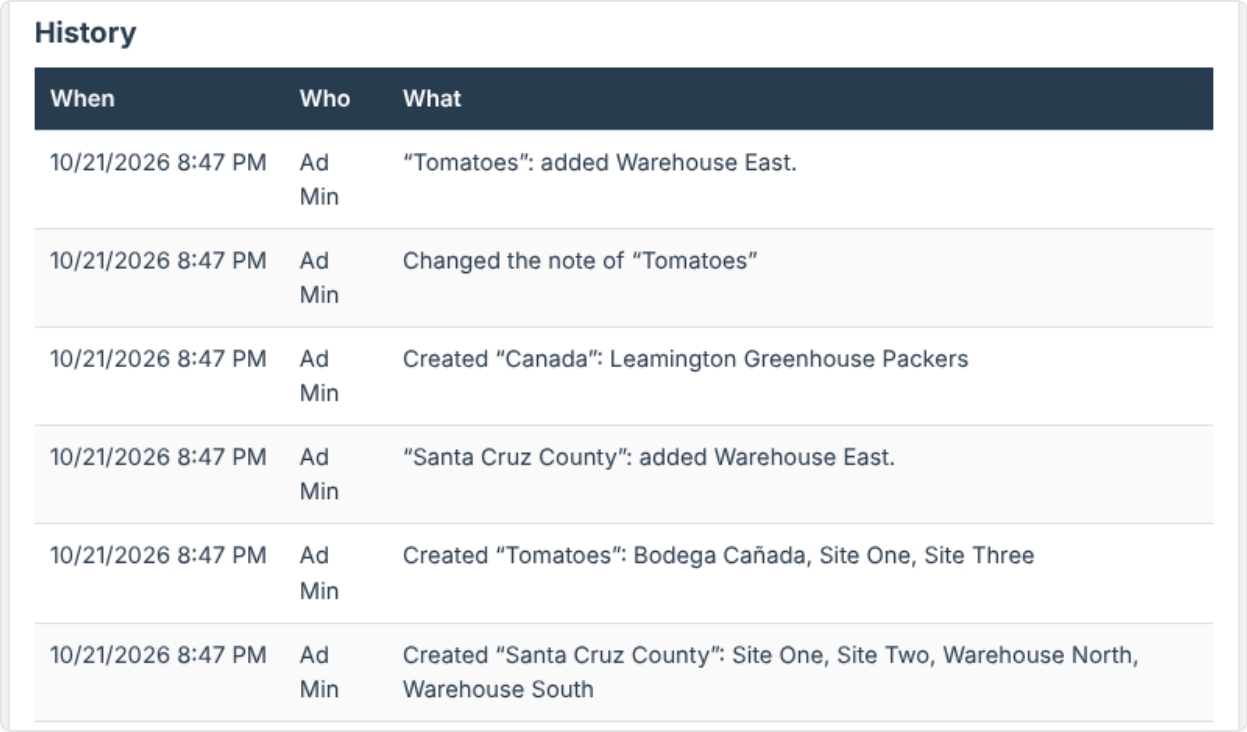


A QC Manager responsible for a site group

- A manager needs at least one site or one group: Tick at least one site or one site group for this manager.
- Too many sites ticked one by one don't fit: Too many sites ticked one by one for the list (...). Put the sites in a site group (Settings > Site Groups) and choose the group instead.
- The users file of the import gives a Quality Control Manager groups the same way, with its Site groups column (see 6.55).

HISTORY

History, below the groups, lists the last 50 changes, the newest first, with When, Who and What: Created “Tomatoes”: Bodega Cañada, Site One, Site Three; Renamed “A” to “B”; Changed the note of “Tomatoes”; “Santa Cruz County”: added Warehouse East.; Deleted “Warehouses”. The groups made and the sites added by an import, or on Site Setup (see 6.58), are listed there too.



History

When	Who	What
10/21/2026 8:47 PM	Ad Min	“Tomatoes”: added Warehouse East.
10/21/2026 8:47 PM	Ad Min	Changed the note of “Tomatoes”
10/21/2026 8:47 PM	Ad Min	Created “Canada”: Leamington Greenhouse Packers
10/21/2026 8:47 PM	Ad Min	“Santa Cruz County”: added Warehouse East.
10/21/2026 8:47 PM	Ad Min	Created “Tomatoes”: Bodega Cañada, Site One, Site Three
10/21/2026 8:47 PM	Ad Min	Created “Santa Cruz County”: Site One, Site Two, Warehouse North, Warehouse South

The history of the site groups

6.57 Permission Sets

gear > Users > Permission Sets gives many Users the pages of their job at once. A permission set is a named list of pages for one job, such as the receiving clerk, the shipping clerk or the person who does the packing house checks. Given to a User, it fills in their pages as Add / Change User Permissions would (3.3), so that each clerk sees the three or four pages of their job and nothing else. A set can be given in one go to every User of a site, or of a site group (6.56), and new Users get theirs from the user import (6.55). Permission Sets is on the gear menu, under Users, after Add / Change User Permissions. It works at every site, with QA or without.

Who	What they do
System administrators	Keep the sets: add the usual sets, add and change sets, and stop offering one. Give a set to any User.
Quality Control Managers	See the sets, give them to the Users of their sites, and see those Users' pages.

> **Note:** Sets are given to Users only: Quality Control Managers have every page, and grower users have their own (3.3). Users don't open this page.

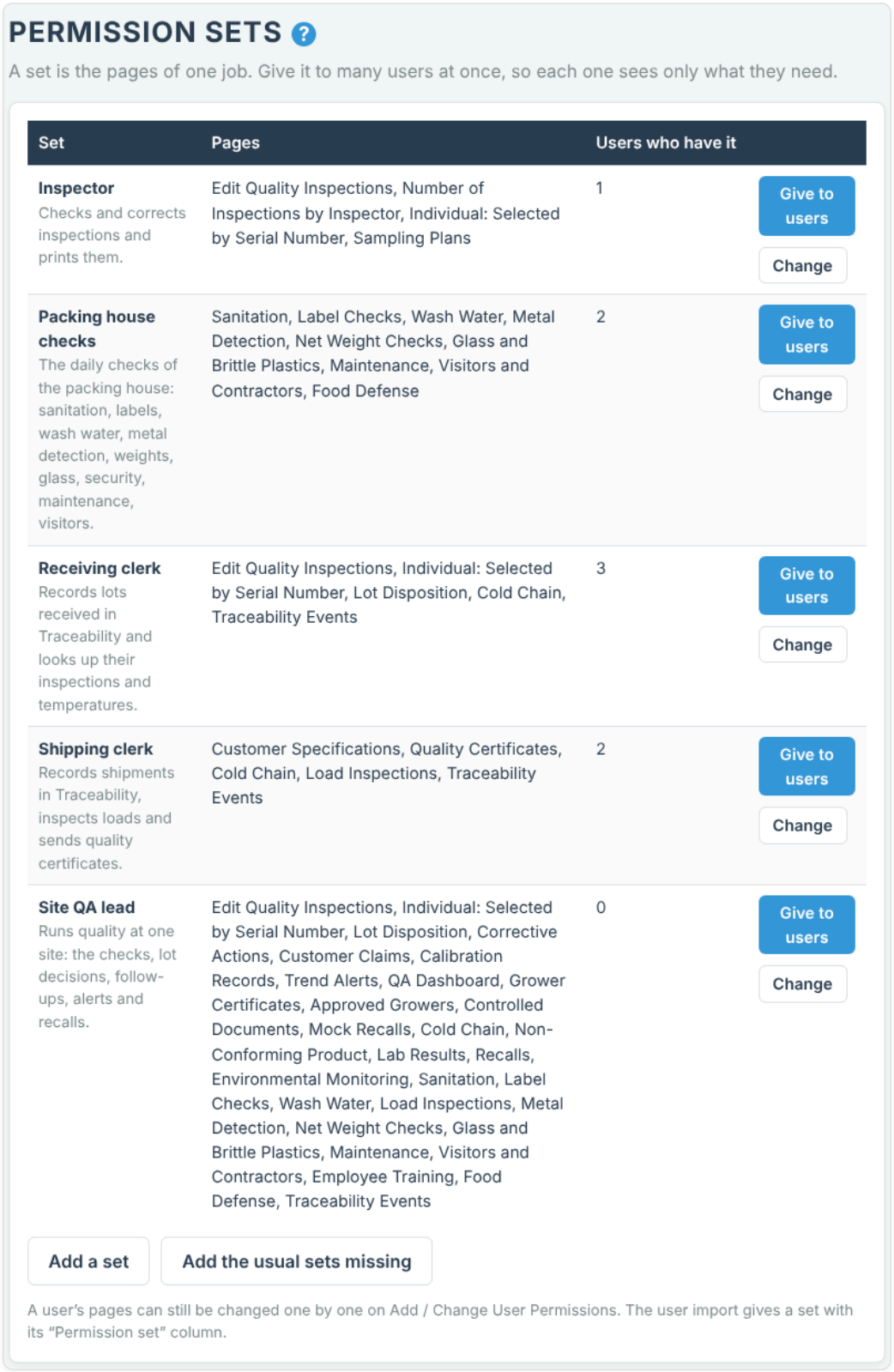
THE USUAL SETS

While there is no set yet, a Quality Control Manager sees No set yet. The sets are made by a system administrator (Settings > Users > Permission Sets). Your users and their pages are below., and a system administrator sees No set yet. and Add the usual sets. It adds five sets to start from, each with its Spanish name and what the job does; change them afterwards to fit your company:

- Receiving clerk (Recepción): Traceability Events, Edit Quality Inspections, Individual: Selected by Serial Number and Cold Chain. It records the lots received in Traceability and looks up their inspections and temperatures.
- Shipping clerk (Embarques): Traceability Events, Load Inspections, Customer Specifications, Quality Certificates and Cold Chain.
- Inspector: Edit Quality Inspections, Individual: Selected by Serial Number, Number of Inspections by Inspector and Sampling Plans.
- Packing house checks (Revisiones del empaque): Sanitation, Label Checks, Wash Water, Metal Detection, Net Weight Checks, Glass and Brittle Plastics, Food Defense, Maintenance and Visitors and Contractors.
- Site QA lead (Líder de calidad del sitio): the pages of Packing house checks, and QA Dashboard, Trend Alerts, Lot Disposition, Traceability Events, Edit Quality Inspections, Individual: Selected by Serial Number, Corrective Actions, Non-Conforming Product, Customer Claims, Lab Results, Environmental Monitoring, Mock Recalls, Recalls, Cold Chain, Load Inspections, Grower

Certificates, Approved Growers, Controlled Documents, Employee Training and Calibration Records (29 pages).

The message says how many were added: “5 usual sets added. Look at their pages and change them to fit your company.” Later, Add the usual sets missing, below the list, adds back those of the five whose English name no set has (“The usual sets are all there already.” when none is missing); a set already there is left as it is.



The permission sets, as a system administrator sees them

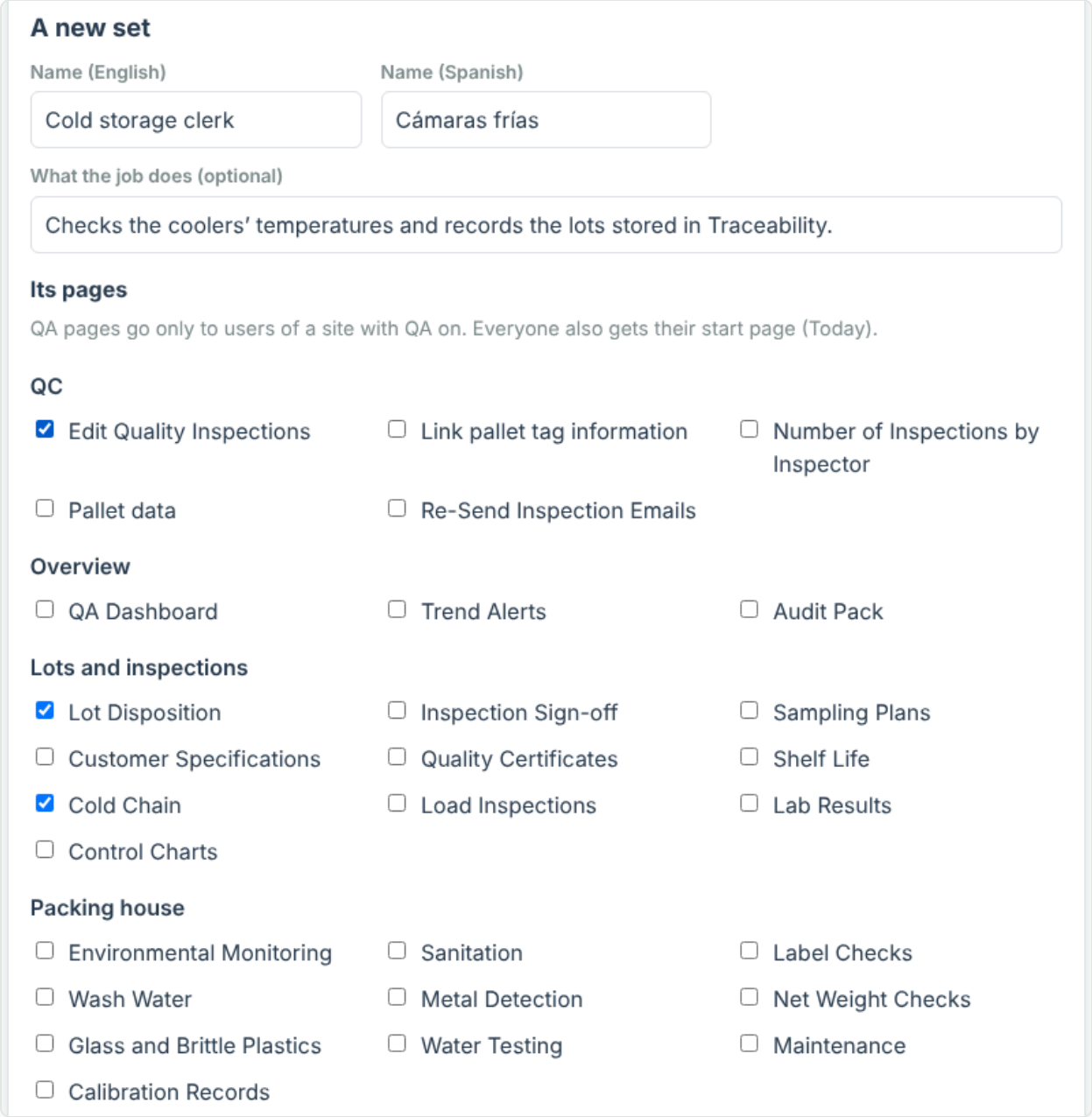
The list shows each set by its name (in Spanish to those who work in Spanish, when the set has a Spanish name), with what the job does, its pages, and the

Users who have it: those it was last given to. Give to users opens the Users to give it to; Change (system administrators) opens the set. A set no longer offered is greyed, with (no longer offered), and can’t be given. In the picture, the company added Lot Disposition to its Receiving clerk.

ADDING OR CHANGING A SET

System administrators add and change the sets:

1. Select Add a set, or Change on a set.
2. Type the Name (English) and, if you want, the Name (Spanish), up to 80 characters each: Users who work in Spanish see the Spanish one.
3. Type What the job does (optional), up to 300 characters.
4. Under Its pages, tick the job’s pages. They are the pages a User can be given on Add / Change User Permissions, by menu: QC, then the QA pages by section, then Reports.
5. Select Save.



A new set: its names, what the job does and its first pages

QA pages go only to users of a site with QA on, as the page says, and everyone also has their start page, Today (6.60), which isn't in the list. After saving, the message says "The set was saved. Users who have it keep their pages until it is given to them again.": changing a set changes no one's pages; give it again to those who have it (see below).

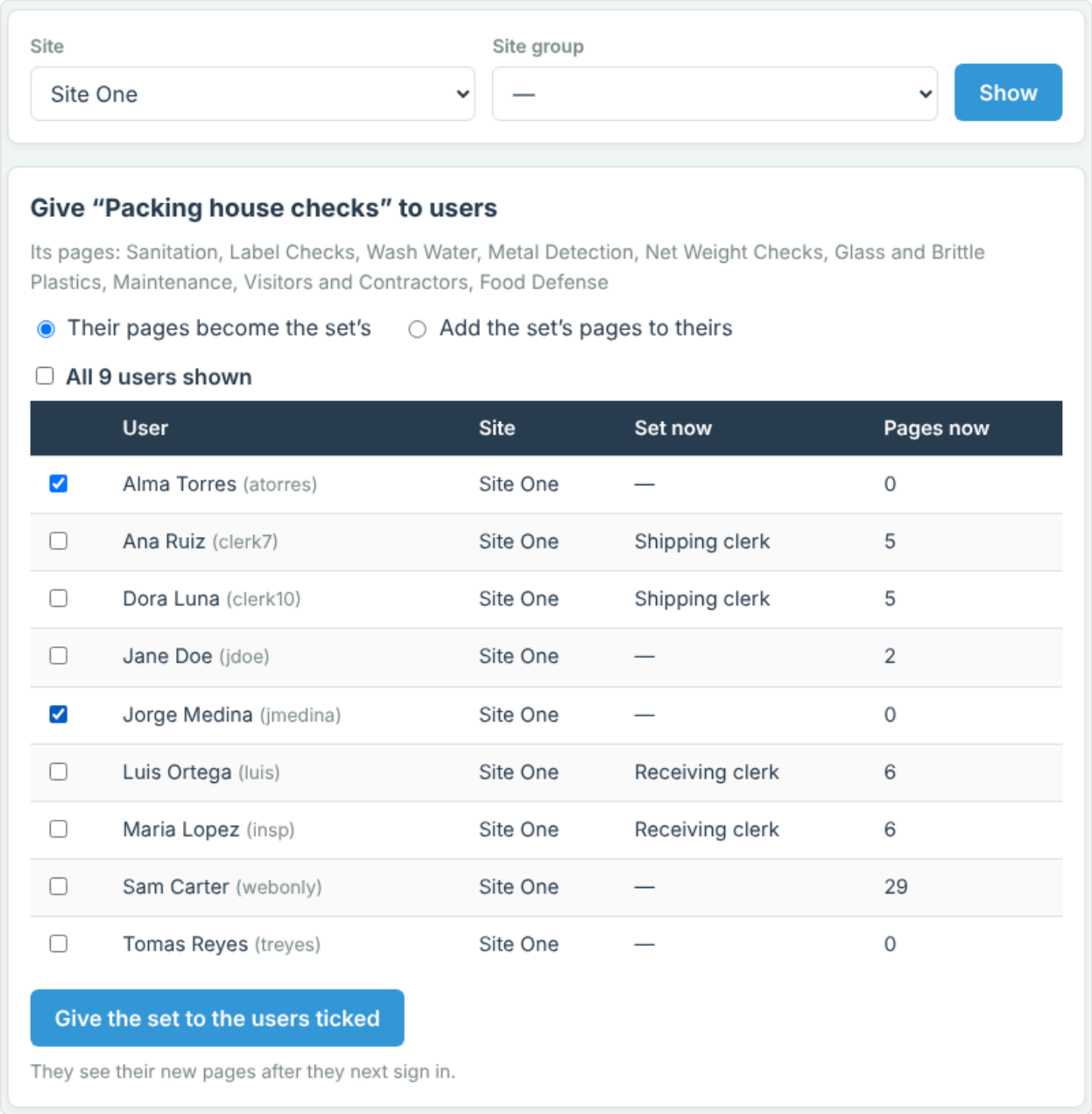
To stop offering a set, tick No longer offered (users who have it keep their pages) and select Save: it can no longer be given, nor named in the user import. Untick it to offer the set again.

> **Note:** A set needs a name and at least one page (“Give the set a name.”, “Tick at least one page.”). Each name, English or Spanish, can belong to one set only (“Another set has that name.”), since the user import finds a set by either. A company keeps up to 50 sets (“At most 50 sets.”). If someone else saves the set while you are changing it, the page says “Someone changed this set first. Here it is as saved now: make your change again.”

GIVING A SET TO USERS

System administrators give a set to any User; Quality Control Managers, to the Users of their sites.

1. Select Give to users on the set.
2. Choose the Site (All your sites, or one of your sites) and, if you want, a Site group, and select Show. The list shows those sites’ Users: each one’s name and username, Site, Set now (the set they were last given, or —) and Pages now (how many pages they have).
3. Choose how: Their pages become the set’s (to start with): the pages they could be given that aren’t in the set are taken off; or Add the set’s pages to theirs: they keep the pages they have.
4. Tick the Users, or tick All N users shown to give it to every User the filter shows.
5. Select Give the set to the users ticked.



Giving Packing house checks to two new clerks of Site One

The message says how many Users were given it: “Given to 2 users. They see their pages after they next sign in.”, and Set now shows the set. A set fills in each User’s pages as Add / Change User Permissions does:

- QA pages go only to Users of a site with QA on. A User whose site has QA off gets the set’s other pages, and the QA pages they had, set aside while QA is off, are left as they are.

- A User who would get no page at all, because every page of the set is a QA page and their site has QA off, is left as they were, and the message counts them: “1 user was left as they were: their site has QA off, and every page of this set is a QA page.”
- A page’s helper pages follow it: Edit Quality Inspections brings the page that saves its changes, and Individual: Selected by Serial Number its report.
- Each User is changed on their own. If some couldn’t be, the message says so, for example “Given to 40 users; 2 could not be changed. Please try again.”

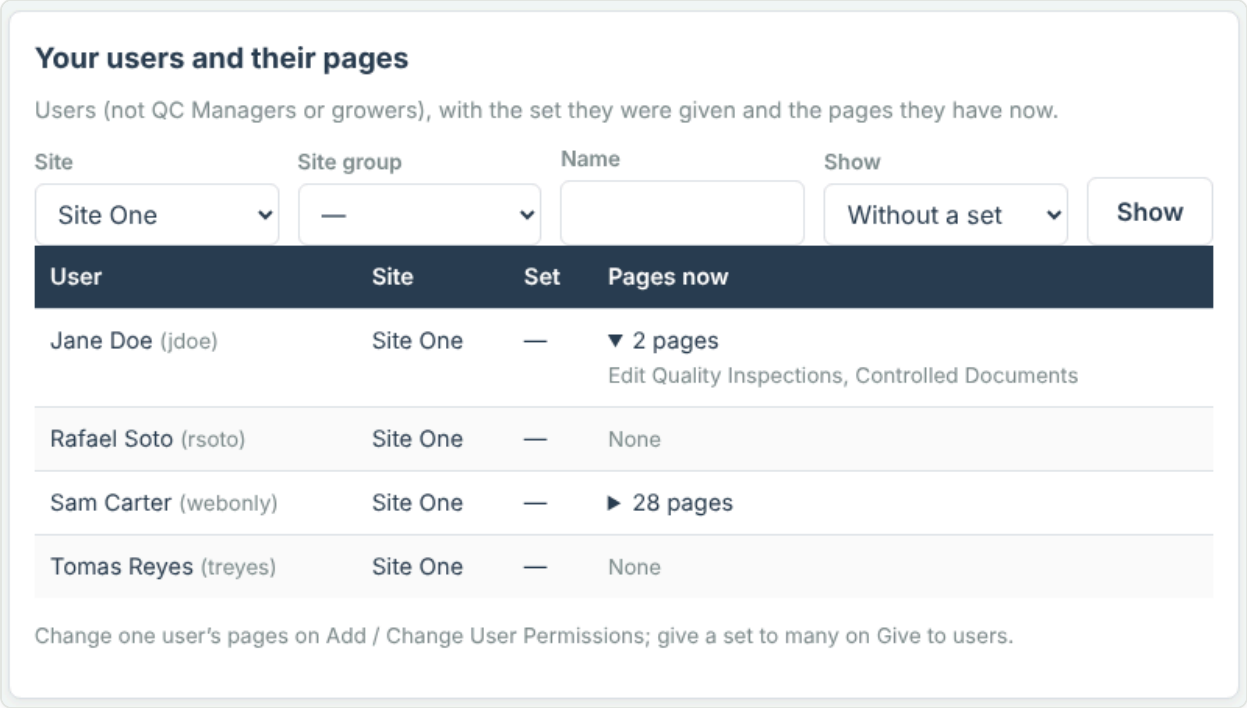
Afterwards, a User’s pages can still be changed one by one on Add / Change User Permissions (3.3); Set now keeps showing the set they were last given.

> **Tip:** All N users shown gives the set to every User the Site and Site group show, not only those the browser sent: the page finds them again when it saves. For a new site whose Users all do one job, choose the site, tick All N users shown and give the set once.

> **Note:** The list shows at most 5000 Users at a time. With more, the page says “Only the first 5000 users are shown: choose a site to see the others.”, and All N users shown gives the set to those 5000 only: give it site by site.

USERS AND THEIR PAGES

Below the sets, Users and their pages (for a Quality Control Manager, Your users and their pages: the Users of their sites) lists the Users, not Quality Control Managers or growers, with the set each was given and the pages they have now, also before any set is made. Choose a Site (All your sites, or one), a Site group, part of a Name, and in Show All, Without a set or With no pages, and select Show; 50 Users a page.



A QC Manager's Users without a set

Pages now says how many pages each User has (None when they have none, so they can't sign in to the website); select it to see their names. Change one User's pages on Add / Change User Permissions (3.3); give a set to many with Give to users (above). Saving a set and giving it are listed on Administration History (3.8 of the user manual).

A SET FROM THE USER IMPORT

The users file of the import (6.55) has a Permission set column (Conjunto de permisos in Spanish; the headings set, job, conjunto and puesto work too), for Users: the name of a set offered, in English or Spanish. Once the User is added, their pages become the set's, and the column is used instead of Same permissions as. The check before the import says what each row gets:

- A User with a set offered: "Gets the permission set Receiving clerk."
- Both columns filled in: "The permission set is used, not the "Same permissions as" column."
- A Quality Control Manager with a set: "A QC Manager has every page: the permission set column is left out."

- A name that isn't that of a set offered: "No permission set named Packer (Permission Sets)." The row isn't imported.
- A set of QA pages only, for a User of a site with QA off: "Every page of the permission set Packing house checks is a QA page, and this user's site has QA off: choose another set." The row isn't imported.

If the set stops being offered between the check and the import, or can't be given, the User is still added, and the result says "The user was added, but the permission set is no longer offered: give their pages on Add / Change User Permissions." or "The user was added, but the permission set could not be given: give it on Permission Sets."

6.58 Site Setup

Overview > Site Setup gets many sites ready without opening each one. It shows the company's steps with their counts and every site's setup, with what is still to do there and a link to where it is done, and does the work of many sites in one go: copying a site's QA setup to the sites chosen (certain sites, a site group or all your sites), the traceability settings of the sites ticked, and adding them to a site group. System administrators also choose here where people land after signing in. It is in the Overview menu, after Company Overview.

Who	What they do
Quality Control Managers	See their sites; copy the QA setup from one of their sites to others, and save the traceability settings of their sites.
System administrators	See every site; also add sites to a site group and choose where people land after signing in.

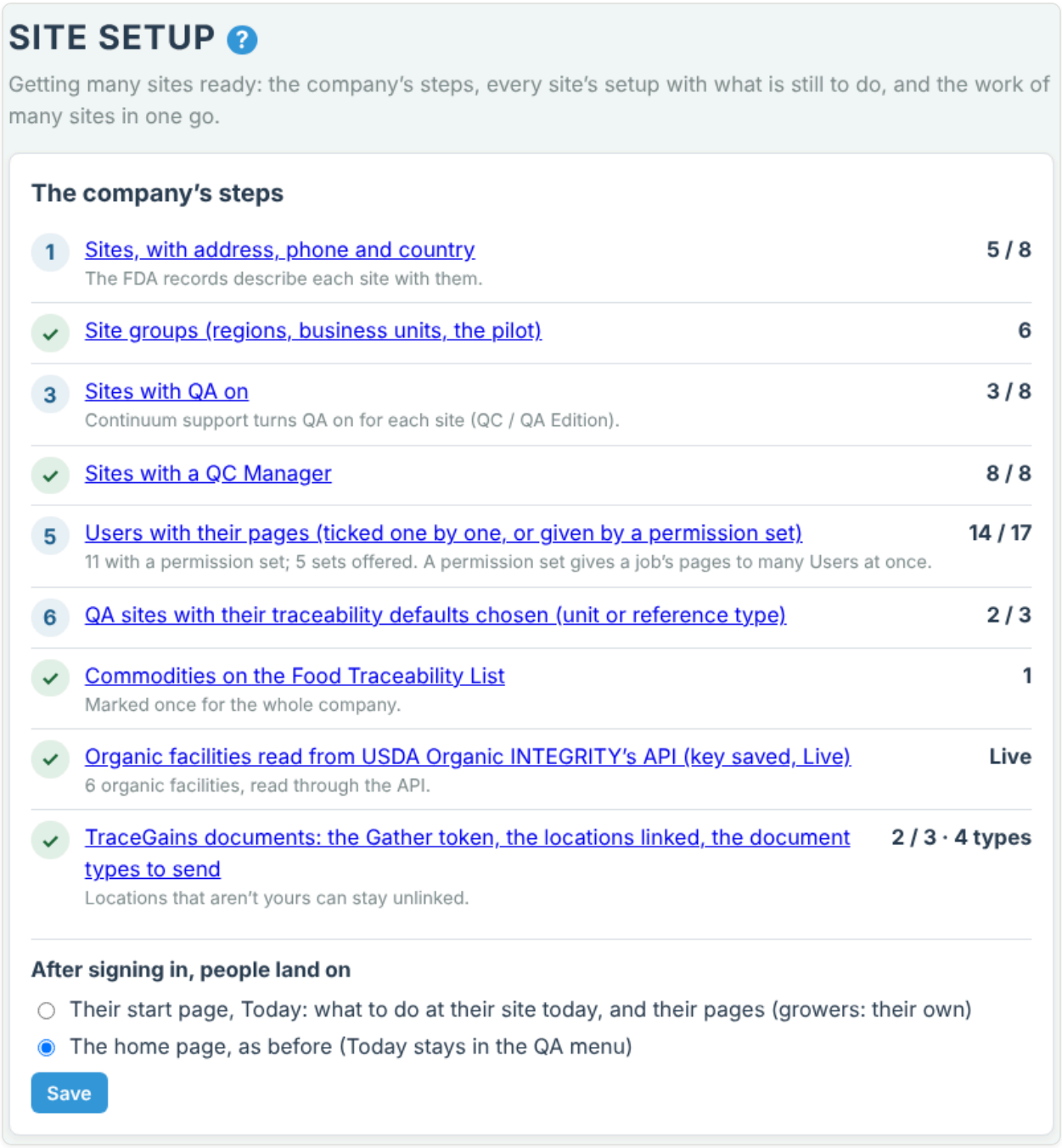
> **Note:** Users don't have Site Setup. It lists your active sites, those with QA off too; only sites with QA on can be ticked for the work.

THE COMPANY'S STEPS

The company's steps, at the top, count your active sites (the site groups, the sets offered and the Food Traceability List are the company's). A step done shows a check mark instead of its number, and a step can open the page where it is done:

Step	What it counts
Sites, with address, phone and country	The sites with the street address, city, state, ZIP code and phone filled in on Add / Change Sites, and a known country: set on QA Setup, or the United States or Canada from the site's Country, state or province (6.32). The FDA records describe each site with them (6.61). For system administrators it opens Import Sites, Growers and Users (6.55).
Site groups (regions, business units, the pilot)	The company's site groups; done with one. For system administrators it opens Site Groups (6.56).
Sites with QA on	The sites with QA on. Whether a site has QA is part of your company's subscription: Continuum support turns QA on for each site (A.1), as the note under the step says.
Sites with a QC Manager	The sites with at least one active Quality Control Manager. For system administrators it opens Add / Change QC Managers (3.3).
Users with their pages (ticked one by one, or given by a permission set)	The Users of those sites with a page they may open, ticked one by one on Add / Change User Permissions or given by a permission set, of all their Users. The note says how many have a permission set and how many sets are offered. While some Users have no page, it opens People with No pages (3.7 of the user manual); then Permission Sets (6.57).
QA sites with their traceability defaults chosen (unit or reference type)	The sites with QA on whose traceability settings have a default unit of measure or reference document type (6.61). It goes to the work for many sites, below.

Step	What it counts
Commodities on the Food Traceability List	The commodities marked, once for the whole company. It opens the list in the settings of Traceability Events (6.61).
Organic facilities read from USDA Organic INTEGRITY's API (key saved, Live)	Shown while the company has organic facilities in Buyer Compliance: Live once the api.data.gov key is saved and USDA Organic INTEGRITY is Live, else Key saved, not Live or No key; the note says how many organic facilities there are, read through the API once it is Live, their certificates added by hand until then (6.64). For system administrators it opens Buyer Compliance's Systems.
TraceGains documents: the Gather token, the locations linked, the document types to send	Shown when a buyer uses TraceGains or a Gather API token is saved: the TraceGains locations linked, of those read, and how many document types are sent, or No token, with the note to ask TraceGains API Support (APISupport@tracegains.com) for one. Done with the token, a location linked and a document type; locations that aren't the company's can stay unlinked (6.64). For system administrators it opens the TraceGains tab of Buyer Compliance.



The company's steps, and where people land after signing in

EVERY SITE

Every site lists your active sites by name, 25 a page (the page numbers are below the list). Choose a Site group and select Show to list only its sites; the line beside it says how many active sites are listed. Each row shows:

Column	What it shows
Site	The site’s name and its site groups.
QA	✓ when the site has QA on, × when not.
Address	✓ when its address, phone and country are complete, as in the first step, with the country (US or CA) when it is known.
QA Setup	How many items of the site’s QA Setup are ready and to do, opening its QA Setup (6.32); — when QA is off.
Growers (farms complete)	The growers on the site’s grower list and, in parentheses, those whose farm has its phone and address for the FDA records (Traceability Events > Locations, 6.61).
Users (with a set)	The site’s Users and, in parentheses, those given a permission set.
QC Managers	The site’s Quality Control Managers, or × when it has none.
Traceability	Set up when a default unit or reference document type is chosen, else Not set up, in red; below, the traceability events of the last 30 days, and growers record harvests when its growers record their own (6.62). — when QA is off.
Still to do	✓, or what is still to do, most items opening where they are done.



Every site, with what is still to do

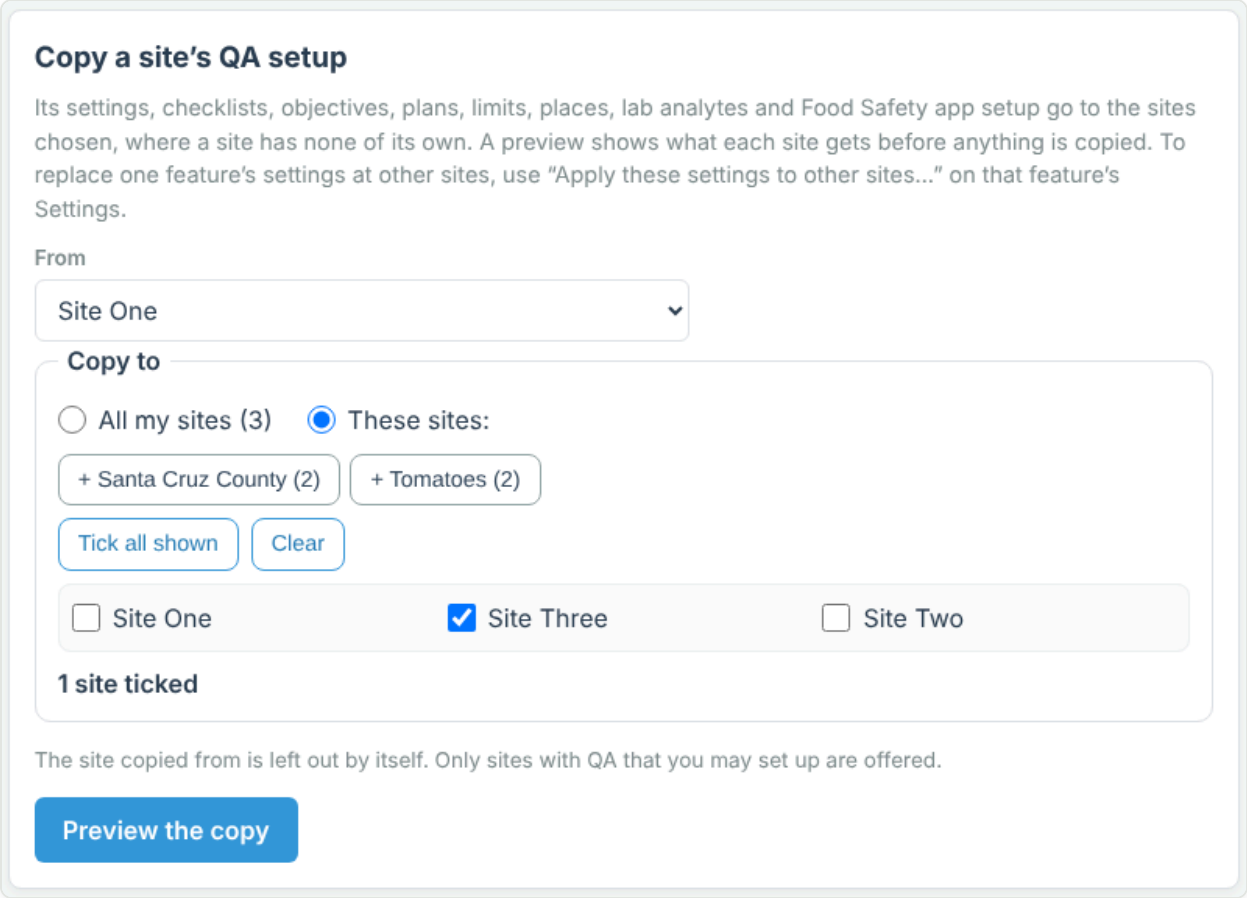
Still to do can list:

- The site’s address, phone or country (Add / Change Sites): see the first step.
- QA is not on (Continuum support turns it on): see A.1. It is a link only for Continuum support, to QC / QA Edition.
- Items to do on QA Setup: opens the site’s QA Setup (6.32).
- No growers on its list, and No users: open Import Sites, Growers and Users (system administrators, 6.55).
- No QC Manager: opens Add / Change QC Managers (system administrators, 3.3).
- Traceability: no default unit or reference type chosen: opens the site’s traceability settings (6.61).

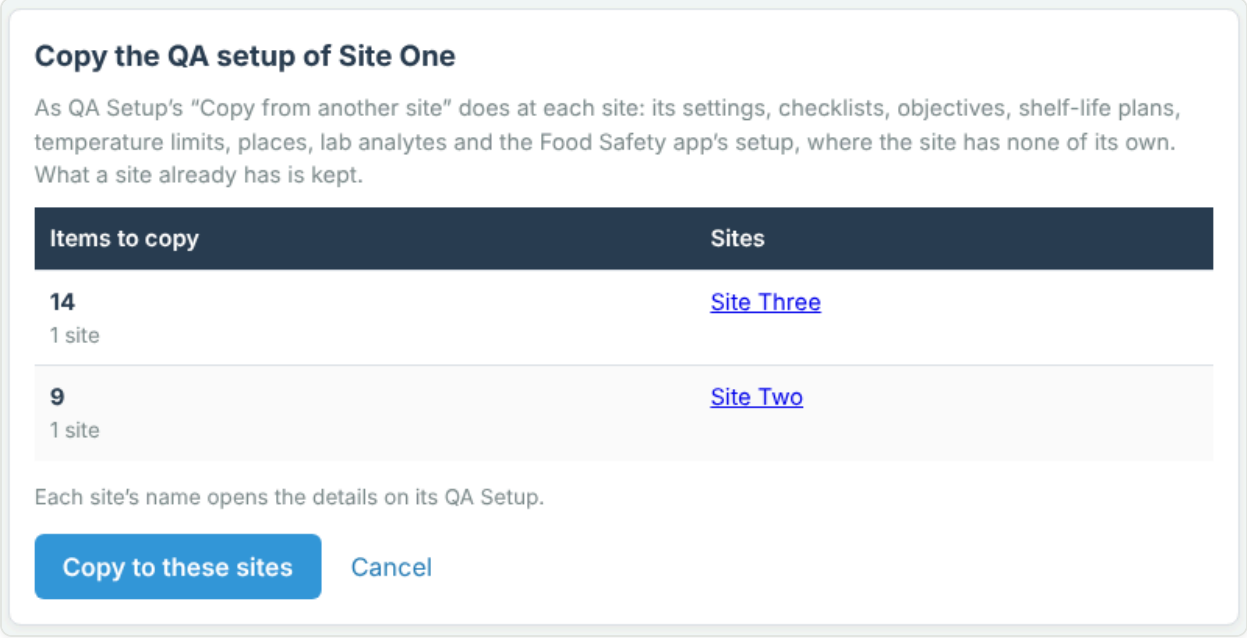
COPYING A SITE’S QA SETUP TO MANY SITES

A site set up well can be copied to many sites at once, as QA Setup’s Copy from another site does at each site (6.32): its settings, checklists, objectives, shelf-life plans, temperature limits, places, lab analytes and the Food Safety app’s setup, where a site has none of its own. What a site already has is kept.

1. Under Copy a site’s QA setup, choose the site to copy From.
2. Under Copy to, choose All my sites (N), or These sites: and tick them: each site group has a button that ticks its sites, such as + Tomatoes (2); Filter sites… (more than 5 sites), Tick all shown and Clear help with many. The site copied from is left out by itself.
3. Select Preview the copy. Nothing is copied yet.
4. Read the preview, Copy the QA setup of …: the sites are grouped by how many Items to copy, with the sites that have Nothing to copy: they have their own, and those that Could not be worked out. Each site’s name opens the details on its QA Setup.
5. Select Copy to these sites, or Cancel.



Copying Site One's QA setup to a site chosen



The preview of the copy, the sites grouped by what they get

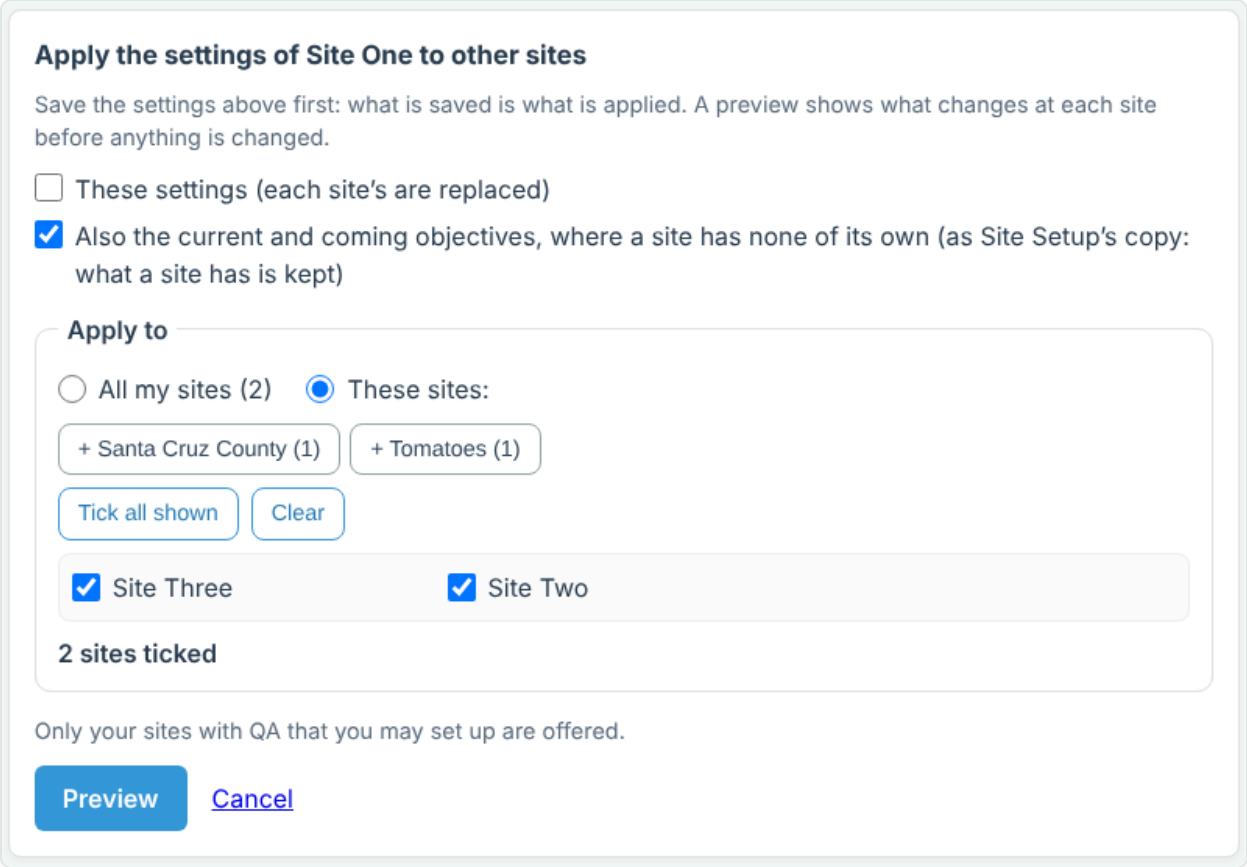
Only the sites with something to copy are copied. The message says to how many: “QA setup copied to 2 sites.”, with, when it applies, “1 had nothing to copy.”, “2 changed meanwhile: preview them again.” (their setup changed after the preview) and “1 could not be copied: open QA Setup at those sites.” Quality Control Managers copy from a site of theirs to the others of theirs; system administrators between any sites with QA on.

> **Note:** Without a site in From: “Choose the site to copy from.” With no site chosen: “Choose the sites to copy to (sites with QA on, other than the one copied from).” A preview kept too long: “That preview is no longer available: preview the copy again.”

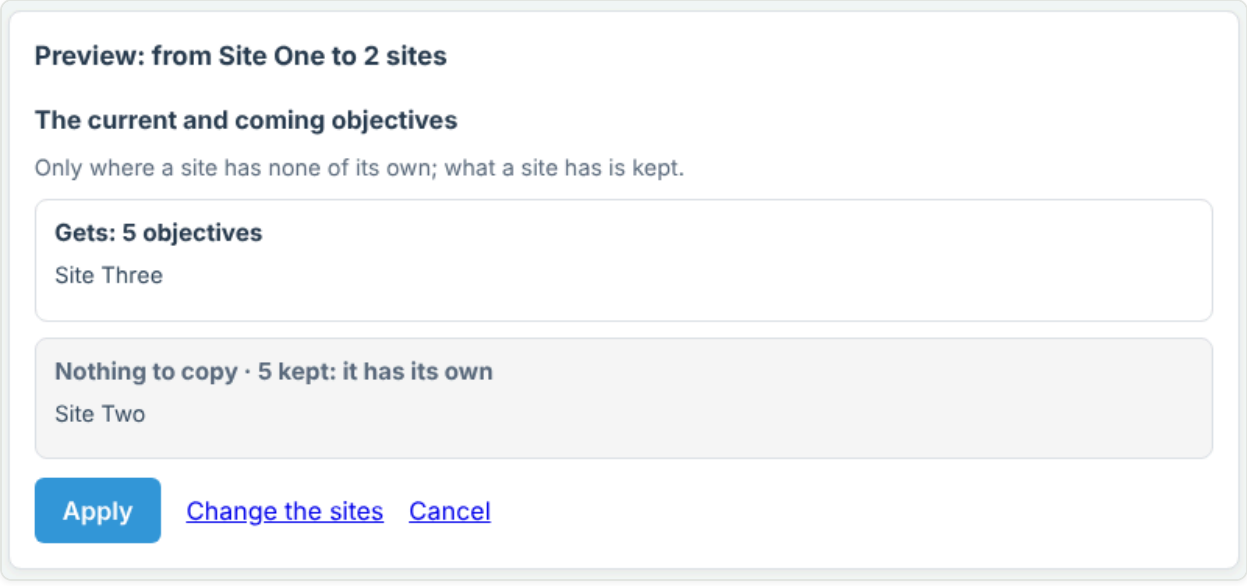
APPLYING ONE FEATURE’S SETTINGS TO OTHER SITES

Where the copy only fills in what a site doesn’t have, Apply these settings to other sites... replaces one feature’s settings at the sites chosen with those of the site shown. It is on the Settings of most QA features and of Traceability Events, for Quality Control Managers of the site and system administrators who have another site with QA they may set up. Change Site Settings, where Lot Disposition is turned on, has its own Apply these settings to other sites..., which applies all of that page’s settings (3.2 of the user manual).

1. On the feature’s Settings, save the settings first: what is saved is what is applied.
2. Select Apply these settings to other sites..., below the settings.
3. Tick what to apply: These settings (each site’s are replaced) and, for a feature with lists, Also ... where a site has none of its own: Internal Audits’ checklists, Quality Objectives’ objectives, Shelf Life’s and Sampling Plans’ plans, Cold Chain’s limits and places, Lab Results’ analytes, markets and limits.
4. Under Apply to, choose All my sites (N) or These sites: and tick them, as for the copy above.
5. Select Preview, read what changes at each site, and select Apply (or Change the sites, or Cancel).



Applying Site One's objectives to two sites



The preview: what each site gets

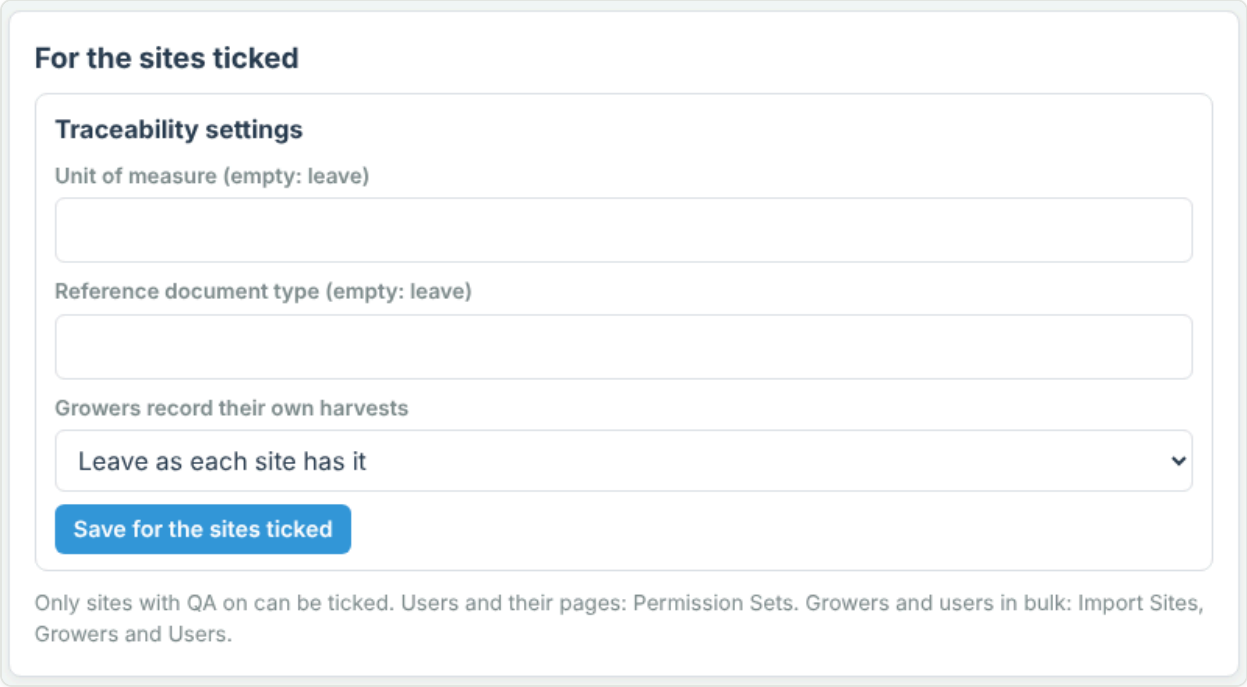
- The preview groups the sites: N sites change, with each Setting as it is Now and as it Will be; N sites already have these settings; N left out: marked not

used there (QA Setup); N you cannot set up. Nothing would change. when nothing would.

- Each site keeps its own people and state: who checks or verifies, whether a feature is paused, the recall contact (Not applied, each site keeps its own: …). A date already in force at a site is kept there (… kept (…), already in force there.).
- After Apply, Applied to other sites lists what was done (Settings applied at 2 sites: …; 1 already had these settings.; 1 changed since the preview and were left as they are: … Preview again.), and each site's history notes the change.
- A site that never saved the settings can't give them: … has never saved these settings (it uses the defaults): save them above first.

TRACEABILITY SETTINGS OF MANY SITES

1. In Every site, tick the sites.
2. Under Traceability settings, type the Unit of measure (cases, cartons, bins, pallets, lb, kg… up to 20 characters) and the Reference document type (Bill of lading, Invoice, Packing slip… up to 40), and choose whether Growers record their own harvests: On, Off, or Leave as each site has it. A box left empty leaves each site's own.
3. Select Save for the sites ticked.



The work for the sites ticked

The message says at how many sites the settings changed: “Traceability settings saved at 2 sites.”, or “Nothing was changed: the sites ticked already had these settings.” What they are for: 6.61 (the site’s defaults for its traceability events) and 6.62 (the growers’ harvest records). With nothing filled in: “Fill in what the sites ticked get.”; with no site ticked: “Tick the sites (with QA on) to change.”

ADDING SITES TO A SITE GROUP

System administrators tick the sites, choose the Group under Add to a site group and select Add the sites ticked. The sites are added to the group (“The sites were added to the group.”); those already in it stay (“Those sites were already in the group.”). Use it, for example, to put the pilot’s sites in a group. Groups are kept on Site Groups (6.56); if someone changed the group at the same time: “Someone changed the group first: try again.”

WHERE PEOPLE LAND AFTER SIGNING IN

Under the company’s steps, system administrators choose, for the whole company, where people land after signing in: Their start page, Today: what to do at their site today, and their pages (growers: their own), or The home page, as before (Today stays in the QA menu), the default. Select Save: “Saved: where

people land after signing in. It applies from their next sign-in.” Who lands where, and the exceptions: see 6.60.

6.59 Company Overview

Overview > Company Overview shows each of your sites with QA on, one row per site: what needs attention there now, the sites that need it most first, and the site’s figures at a glance (Trend Alerts, lots, corrective actions, inspection sign-off, recalls and mock recalls, grower certificates, calibration, customer claims and inspections). It is made for a company with many sites: it shows one site group at a time (see 6.56), or only the sites that need attention. It reads the figures as the QA Dashboard does (see 6.14) and changes nothing. It is in the Overview menu, after QA Dashboard.

Who	What they see
System administrators	Every active site with QA on.
Quality Control Managers	Their active sites with QA on.

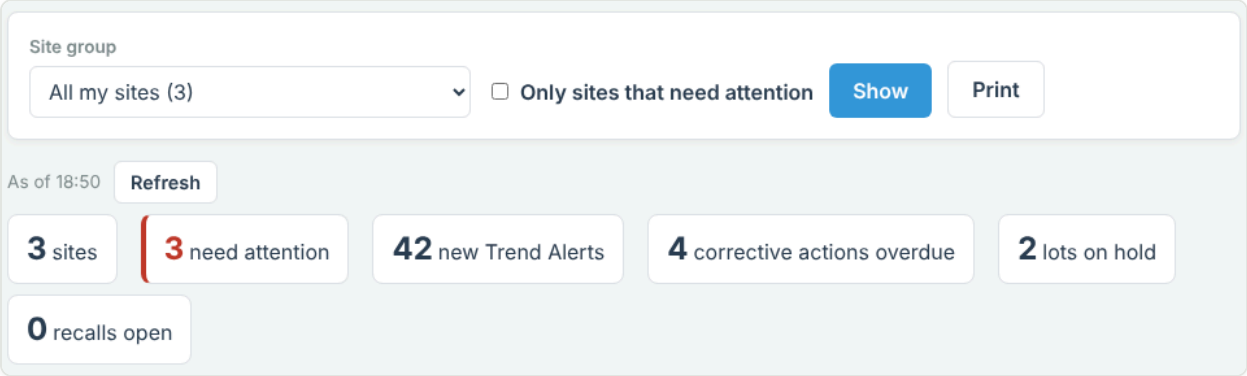
Users don’t have the page: each site’s QA Dashboard (6.14) shows its own figures.

READING THE OVERVIEW

1. Go to Overview > Company Overview.
2. If you want, choose a Site group, or tick Only sites that need attention, and select Show.

The figures come from counts the server keeps for every site every 15 minutes, so the page opens at once: As of says when the oldest were counted, and Refresh counts the sites of the page again now (refreshing 2 of 50…). A site not counted yet comes last and is filled in on its own (loading 3 of 120… beside the count). As they come in, the sites move into order: those with the most red items first (the larger counts first among equals), then those with amber items only, then the rest, by name.

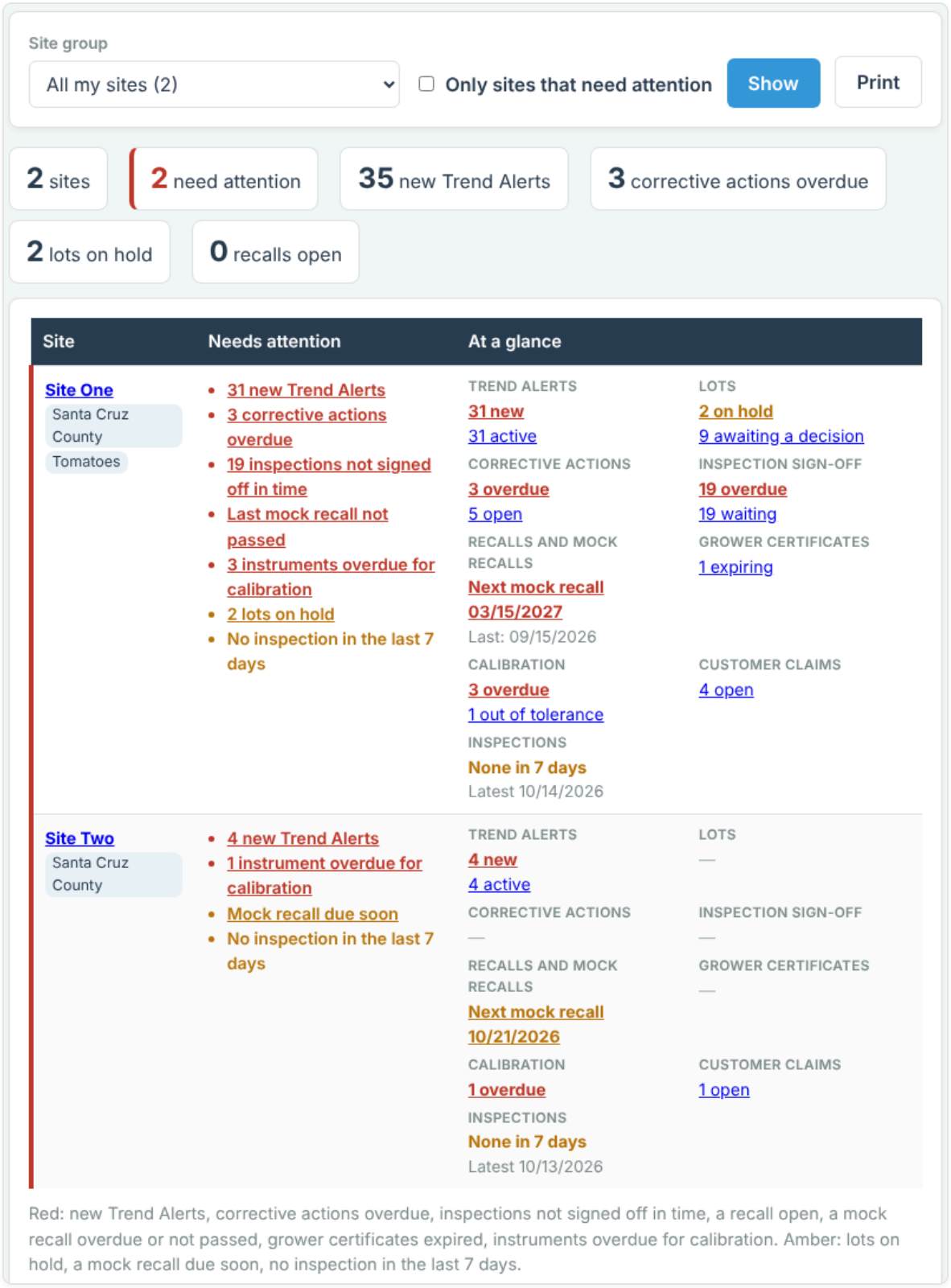
The page shows 50 sites at a time, those needing attention most first, with Previous, Page 1 of 3 and Next below; the totals above count every site.



When the figures were counted, and Refresh

Above the table are the totals: how many sites (all your sites, or sites in the group, with a group chosen, including those Only sites that need attention leaves out), how many need attention (those with something red), and the new Trend Alerts, corrective actions overdue, lots on hold and recalls open. Each site's row has:

- Site: the site's name, which opens its QA Dashboard (6.14) when you have it, and its groups.
- Needs attention: what needs attention there, red items first, each linked to its page when you have that page (No inspection in the last 7 days has no link); Nothing needs attention, in green, when nothing does. The row's left edge is red, amber or green to match.
- At a glance: Trend Alerts (new, active); Lots (on hold, awaiting a decision; Lot disposition off where it isn't on, see 6.7); Corrective actions (overdue, open); Inspection sign-off (overdue, waiting; Off where it is off); Recalls and mock recalls (recalls open; the next mock recall, or Mock recalls: no schedule, and the last); Grower certificates (expired, missing, expiring); Calibration (overdue, out of tolerance); Customer claims (open); and Inspections (how many in the last 7 days, and the latest, or None in 90 days). A dash means nothing to show; Not installed, a feature not installed for your company.



A Quality Control Manager's sites, the ones needing attention first

WHAT NEEDS ATTENTION

Color	What
Red	New Trend Alerts (6.13); corrective actions overdue (6.9); inspections not signed off in time, where sign-off is on (6.16); a recall open (6.39); a mock recall overdue, or the last one not passed with no corrective action raised from it (6.28); grower certificates expired (6.15); instruments overdue for calibration (6.12).
Amber	Lots on hold (6.7); a mock recall due soon (6.28); no inspection in the last 7 days.

> **Note:** Every site's figures are counted in full, whatever pages you have; a number links to its page only when you have that page. Trend Alerts are as of their latest daily check (see 6.13). A site whose figures couldn't be read says Could not be loaded. Reload the page to try again.; one where only some could be read says Some figures could not be loaded.

ONE GROUP, OR ONLY THE SITES THAT NEED ATTENTION

Site group offers All my sites, with how many, and each group that has at least one of your sites, with how many of yours it has (see 6.56); it shows when there is such a group. Choose one and select Show: only that group's sites are listed, and the totals are theirs. Only sites that need attention leaves out the sites with nothing red or amber. Print prints the page as shown. Company Overview has its own Site group list: it doesn't offer Choose sites... or your views (see 6.68); Cross-site Reports shows growers, customers and commodities across any choice of sites (see 6.66).



One group, only the sites that need attention

> **Note:** In the totals, need attention counts the sites with something red. Only sites that need attention also keeps the sites with amber items only, such as Site Three in the picture.

6.60 Today

Overview > Today is the start page: what is waiting for you today at your site, from the pages you have, the site's Trend Alerts, and your pages as large buttons. A receiving clerk sees the lots to record and the four pages of the job; a Quality Control Manager sees the lots, the day's checks, the late follow-ups and the alerts. With several sites, All my sites shows what is waiting at each of them. Growers have their own Today. The company can have everyone land on it after signing in. It is the first page of the Overview menu.

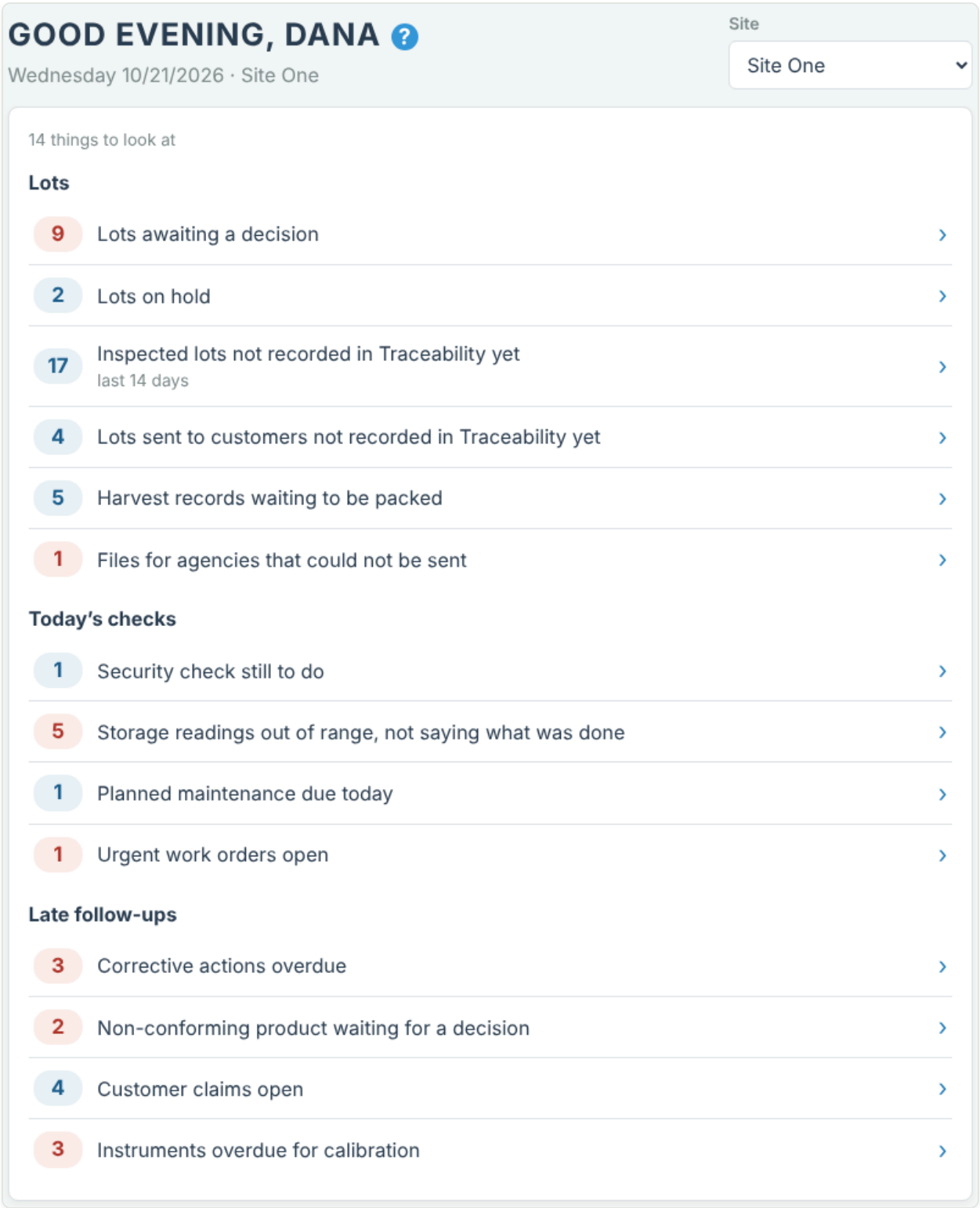
Who	What they do
Everyone at a site with QA on: Users, Quality Control Managers and system administrators	See their Today, with no permission needed: what is waiting at their site from the pages they have, and their pages; with several sites, all of them on All my sites.
Grower users	Have their own Today, while a site of theirs has QA on (A Grower's Today, below).
System administrators	Choose on Site Setup whether people land on Today after signing in (6.58).

WHAT IS WAITING

The page greets you by your first name, with the day and date at the site and the site's name. With more than one site with QA on, the page opens on All my sites (below), unless a choice is already kept from the QA Dashboard or a list (see 6.68). To see one site's Today, choose it in the Site list, or select its name on All my sites; ‹ All my sites, beside the list, goes back. The Site list also offers Choose sites..., your views and the site groups, and the choice is shared with the QA

Dashboard and the lists (see 6.68). Daily digest, beside it, sets up a daily email of what is waiting (see 6.69). The page keeps your choice while you are signed in.

Below come the things to look at, in four groups: Lots, Today’s checks, Late follow-ups and Buyers and certificates. Each line has its number and opens the page where it is dealt with, at that site. A line is there only when there is something to do, and only with the page it opens (the Lot Disposition lines also need lot disposition turned on for the site, 6.7). The number is red for what is late or urgent. With nothing waiting: “Nothing is waiting for you at Site One right now.”



A Quality Control Manager's Today at Site One

The lines Today can show, and what each opens:

Group	Line	Opens
Lots	Lots awaiting a decision	Lot Disposition: the lots inspected in the last 14 days with no decision yet (6.7).
	Lots on hold	Lot Disposition: the lots on hold, inspected in the last 13 months.
	Inspected lots not recorded in Traceability yet	Traceability Events: the inspections of the last 14 days with no initial packing or receiving event (6.61).
	Lots sent to customers not recorded in Traceability yet	Traceability Events: the lots sent to customers on Customer Specifications in the last 14 days with no shipping event (6.24, 6.61).
	Harvest records waiting to be packed	Traceability Events: the harvest records of the last 60 days no initial packing has used yet (6.62).
	Files for agencies waiting for approval, that could not be sent, or to upload by hand	Agency Connections (see 6.63).
	Open loads (with how many are open too long)	Load Inspections, the Open tab (6.44).
	Lots shipped outside a customer’s spec with no reason	Shipments, the Exceptions tab: lots shipped in the last 7 days outside the customer’s spec with no reason (6.70).
	Lots shipped without an inspection here	Shipments, the Exceptions tab: lots on the shipments of the last 7 days with no inspection at the site.

Group	Line	Opens
	Released loads whose lots aren’t recorded as a shipment	Shipments, the Exceptions tab: loads released in the last 7 days whose lots aren’t on a shipment (6.44).
Today’s checks	Pre-op today, not released	Sanitation, the Pre-op tab (6.41).
	Cleaning to do (with how many are due today); Cleaning to verify	Sanitation, the Cleaning and To verify tabs.
	Label start-up checks to do today; Label lines with a check late now	Label Checks, the Today tab (6.42).
	Wash water start-up checks to do today; Wash points with a check late now; Water changes overdue	Wash Water, the Today tab (6.43).
	Metal detector start-up checks to do today; Metal detectors with a check late now	Metal Detection, the Today tab (6.46).
	Failed weight checks to deal with	Net Weight Checks, the Failed tab (6.47).
	Glass and brittle plastics: area checks due today, or overdue; Breakages not cleared	Glass and Brittle Plastics, the To do and Breakages tabs (6.48).
	Security check still to do	Food Defense, the Today tab (6.54).
	Environmental swabs to take; Environmental positives open	Environmental Monitoring, the To swab and Positives tabs (6.40).
	Storage readings out of range, not saying what was done	Cold Chain: the readings out of range of the last 30 days (6.34).

Group	Line	Opens
	Planned maintenance overdue; Planned maintenance due today	Maintenance, the Planned maintenance tab (6.50).
	Urgent work orders open	Maintenance, the Work orders tab.
Late follow-ups	Corrective actions overdue	Corrective Actions, those overdue (6.9).
	Non-conforming product waiting for a decision	Non-Conforming Product, those waiting for a decision (6.35).
	Lab results overdue	Lab Results, those with results overdue (6.38).
	Recalls open (with how many customers are still to tell)	Recalls (6.39).
	Customer claims open	Customer Claims, those open (6.10).
	Grower action requests not answered in time	Grower Action Requests, those overdue (6.19).
	Instruments overdue for calibration	Calibration Records, those overdue or not calibrated (6.12).
Buyers and certificates	Buyer submissions due within 30 days or late	Buyer Compliance, the Submissions tab (6.64).
	Buyer submissions returned by the buyer; Buyer submissions that could not be sent	Buyer Compliance, the Submissions tab.
	Facility certificates that have run out; Facility certificates that run out within 30 days; Facility certificates that could not be read	Buyer Compliance, the Facilities tab (the first two show only those run out, or running out).

Group	Line	Opens
	TraceGains documents to approve; TraceGains documents that could not be sent	Buyer Compliance, the TraceGains tab: the documents to approve, or that could not be sent (6.64).

The three lines of files for agencies are for those who have Agency Connections, system administrators and Quality Control Managers: see 6.63. If part of the list can't be worked out, the page says "Part of today's list could not be loaded; open the pages below to see everything."

The three shipment lines are for those who have Customer Specifications, system administrators and Quality Control Managers: see 6.70.

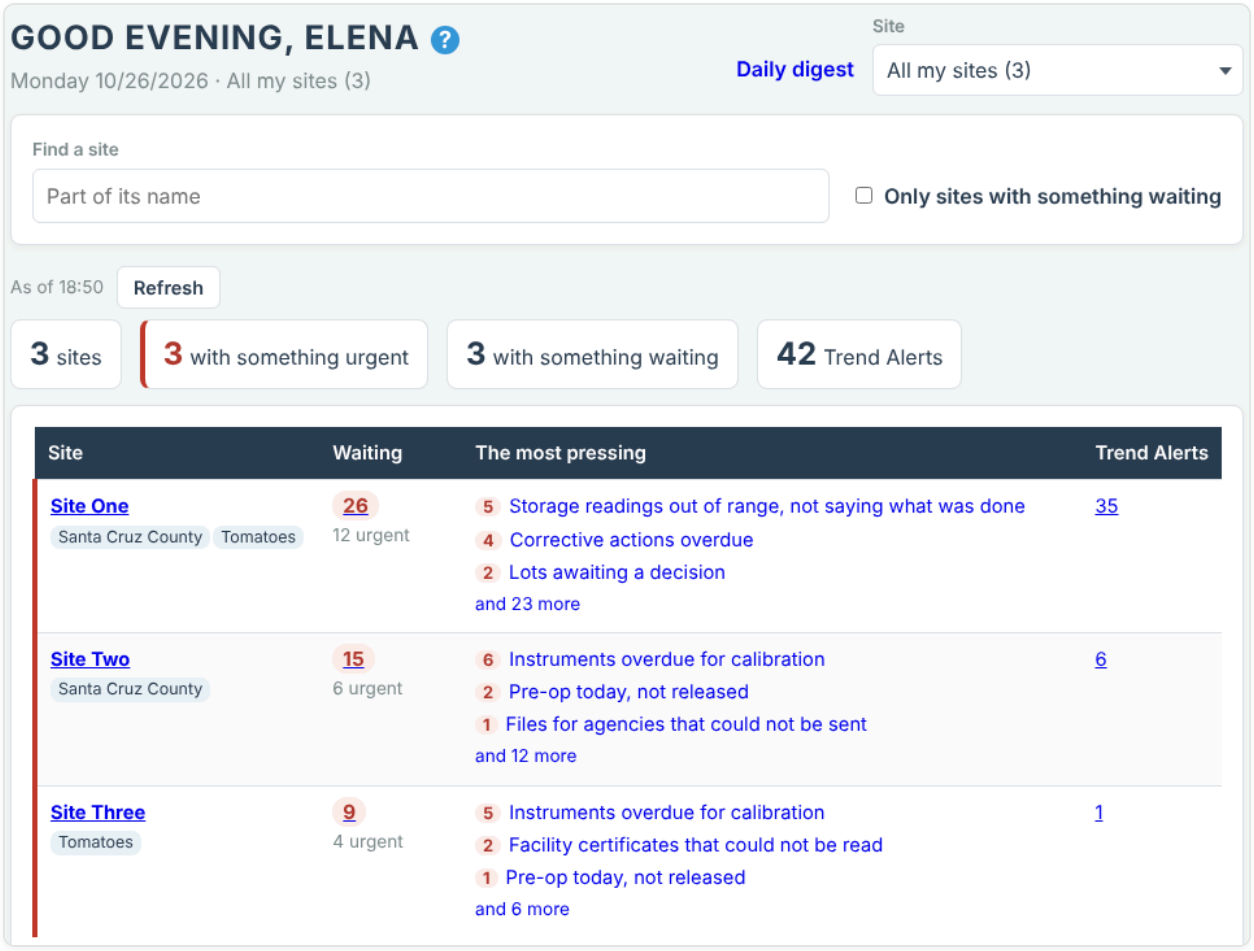
The Buyers and certificates lines are for those who have Buyer Compliance, system administrators and Quality Control Managers: the submissions of the buyers' systems that cover the site and that they answer (a Quality Control Manager answers those that cover only their sites), the certificates of the site's facilities, and the site's documents for TraceGains (see 6.64).

ALL MY SITES

All my sites is for someone with more than one site with QA on, such as a Quality Control Manager of many sites: one row per site, for all of them (a system administrator: every site with QA on). For Quality Control Managers and system administrators, every site's figures come from counts the server keeps for every site every 15 minutes, so all the rows are there at once: As of says when the oldest were counted, and Refresh counts the sites shown again now (refreshing 2 of 3…). A site not counted yet is filled in on its own; until the last one is in, the box with the number of sites says how many are loaded (loading 12 of 100…). The first 50 sites show; Show more shows 50 more (Showing 50 of 120 sites), and Find a site and Only sites with something waiting look through all of them. Each row has:

- Site: its name, which opens the site's Today, and its site groups (see 6.56).
- Waiting: how many things the site's Today lists, in red when some are urgent, with how many (2 urgent); or Nothing waiting.

- The most pressing: up to three lines of the site's Today, the urgent ones first, each with its number and opening its page at that site; and N more opens the site's Today.
- Trend Alerts: how many of the site's alerts are still active, opening Trend Alerts at that site.



All my sites: each site with what is waiting there, the most urgent first

The sites with the most urgent things come first, then those with the most waiting, then by name. With many sites, the list is put in that order every 10 sites loaded and once all are in, so a row doesn't move while you reach for it. The boxes above the list count the sites, those with something urgent, those with something waiting, and their Trend Alerts.

1. To find a site, type part of its name in Find a site: the list keeps the sites that match as you type.

2. To see one group, sites you choose or one of your views, choose it in the Site list at the top (see 6.68).
3. Tick Only sites with something waiting to hide the sites with nothing waiting.

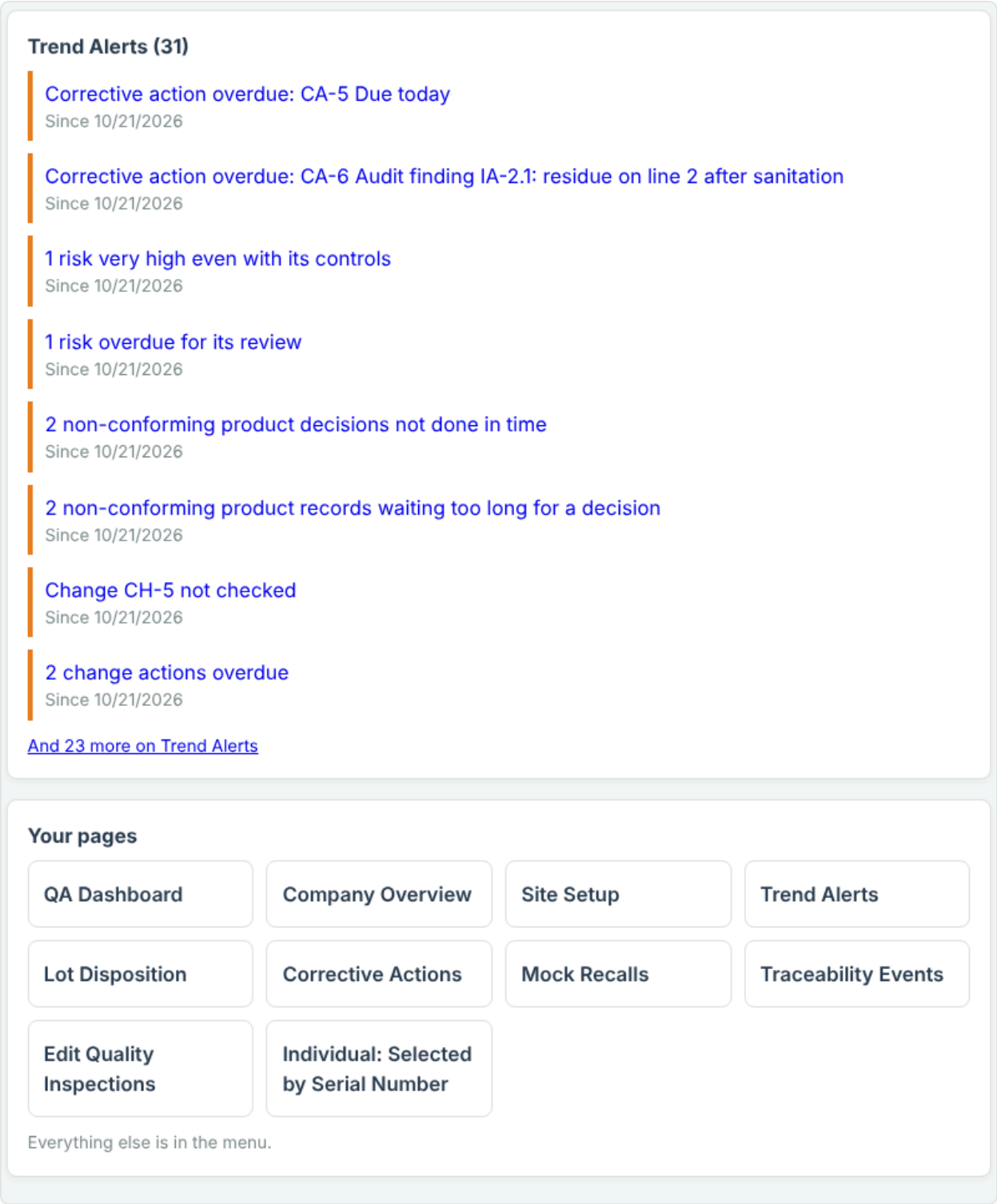
> **Note:** Find a site and Only sites with something waiting are kept while the browser tab is open, so they are still there when you come back from a site's Today.

> **Tip:** A company with many sites can group them by region or crop on Site Groups (see 6.56); each group then is one choice in the Site list, as on Company Overview (see 6.59), which shows the figures of each site rather than the things to do today.

TREND ALERTS AND YOUR PAGES

With the Trend Alerts permission (6.13), Trend Alerts (N) lists the site's alerts still active, those not reviewed first and the newest first, up to 8, each with since when, and reviewed once it has been. Each one opens on Trend Alerts; And N more on Trend Alerts opens the rest.

Your pages are your QA pages, in the order of the QA menus, each opening at the site, then Edit Quality Inspections and Individual: Selected by Serial Number when you have them. With more than 12 QA pages, as a Quality Control Manager has, only the main ones: QA Dashboard, Company Overview, Site Setup, Trend Alerts, Lot Disposition, Corrective Actions, Mock Recalls and Traceability Events. Everything else is in the menu.

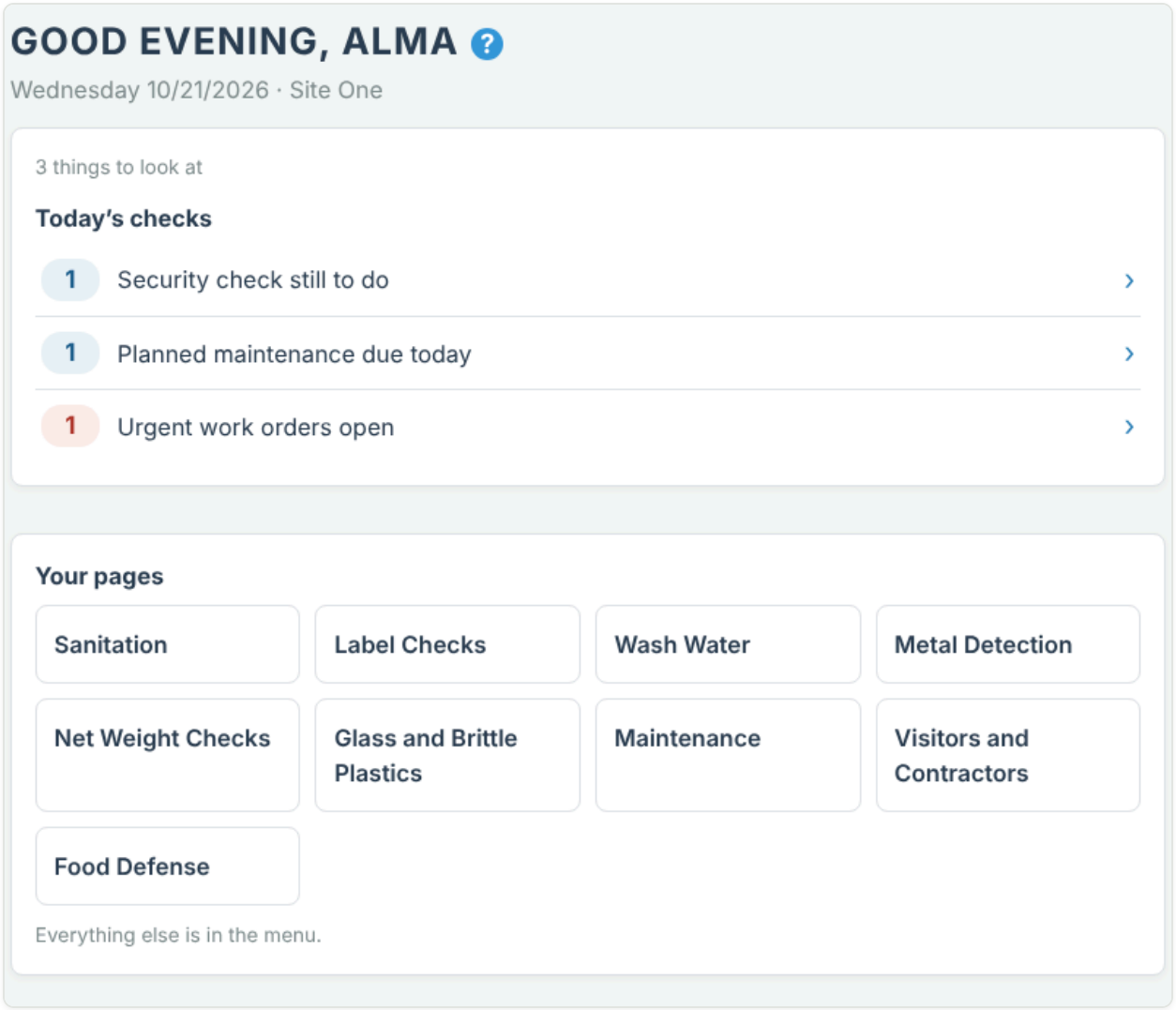


Beside the list: the site's Trend Alerts and the person's pages

System administrators also see whether people land on Today after signing in, with Change it on Site Setup; and, at the top, Administration: what needs them, as on the home page, with links to People, Administration History and the Home page, or Administration: nothing needs you. (3.7 and 3.8 of the user manual).

A CLERK'S TODAY

A User sees only what their pages bring. Alma Torres, a packing house clerk given Packing house checks (6.57), sees the day's security check (6.54), the planned maintenance due today and the urgent work order (6.50), and her nine pages.



The Today of a clerk with the Packing house checks set

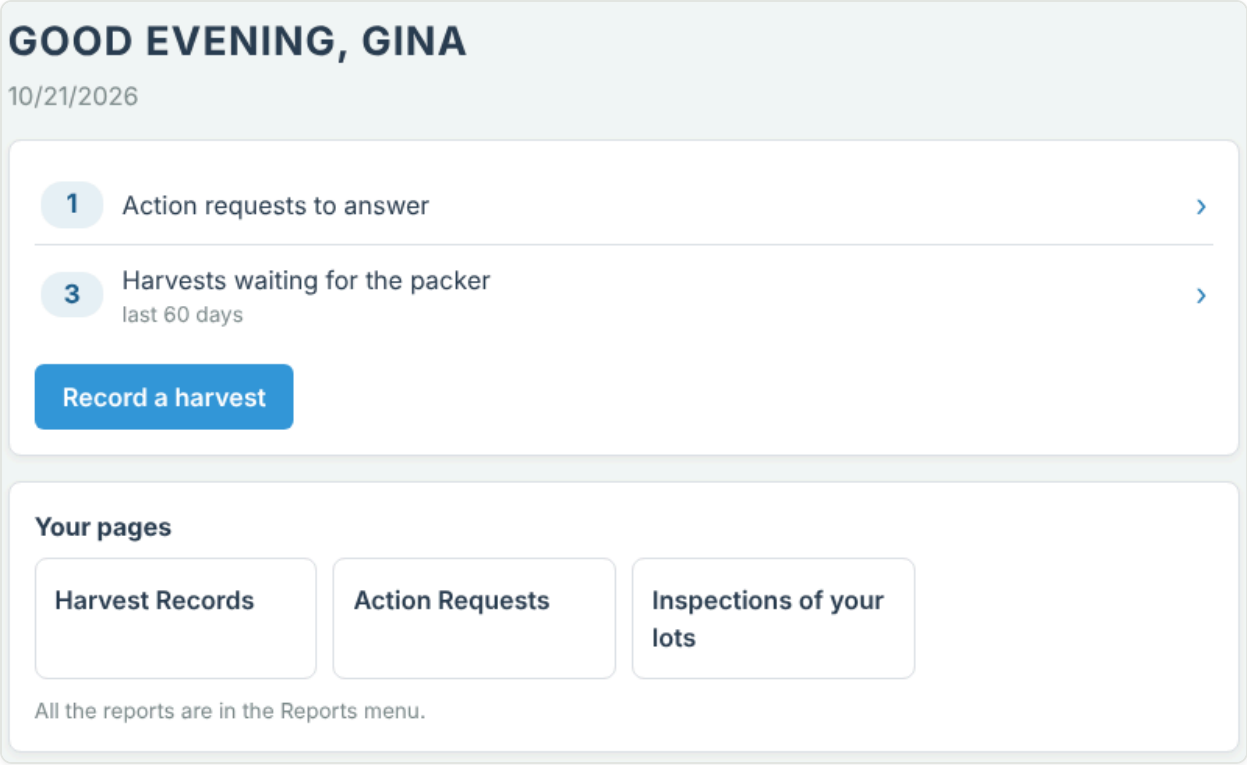
A GROWER'S TODAY

Grower users have their own Today, Grower menu > QA > Today, while a site of theirs has QA on. It lists:

- Action requests to answer: their growers' open action requests; in red, with how many are late, when some are past their answer-by date. It opens Action Requests (6.19).

- Harvests waiting for the packer (last 60 days): the harvest records of their farms that no initial packing has used yet. It opens Harvest Records (6.62).
- Your farm's phone or address is missing, with the farm's name and a red !: The packer needs it for the FDA records. It opens the farm's details on Harvest Records.

Record a harvest opens a new harvest record. Harvest Records and Record a harvest are there once a site of theirs takes the growers' harvest records. Your pages: Harvest Records, Action Requests and their inspection reports, such as Inspections of your lots; All the reports are in the Reports menu. With nothing waiting: "Nothing is waiting for you right now." A grower user with no grower assigned sees "No grower is assigned to your user yet. Ask your quality control contact to assign one." (Assign Grower User to Grower, 3.3).



A grower's Today

LANDING ON TODAY AFTER SIGNING IN

By default, people land on the home page after signing in, as before: Today is in the Overview menu of the QA menus (A.2), and the home page has Go to your start page (Today). A system administrator can have everyone land on Today

instead, on Site Setup (6.58): from their next sign-in, Users, Quality Control Managers and system administrators land on Today, and grower users on their own. Except:

- Someone with no site with QA on has no Today, and lands on the home page.
- Someone whose password must be changed now is sent to change it, as before; someone whose password expires within 10 days lands on the home page, which asks whether to change it now.
- It is only right after signing in; afterwards, Today is in the Overview menu (A.2).

6.61 Traceability Events

Traceability > Traceability Events keeps the records of the FDA Food Traceability Rule for the lots of each site: the events of each lot with their key data elements, the trace of a lot back and forward across the company's sites, and the sortable spreadsheet the FDA can ask for within 24 hours. Events are typed on the page, started from QC's own records (an inspection, a lot sent to a customer), imported from a file, come from the growers' harvest records (see 6.62), or are made from shipments, one shipping event for each lot (see 6.70). It is the first page of the Traceability menu, before Agency Connections (see 6.63).

Who	What they do
Everyone with the Traceability permission	See the events, trace lots, download the FDA spreadsheet, and see the locations and the Food Traceability List; record events and import files at their sites.
Quality Control Managers	All of that, and correct and void events, keep the locations and the site's settings, and mark the commodities on the Food Traceability List (for the whole company).
Growers (grower users)	Don't see this page: they record their own harvests on Harvest Records, at the sites that take them (see 6.62).

> **Note:** Give Users the Traceability permission on gear > Users > Add / Change User Permissions (3.3), or with a permission set that has it (see 6.57); they see the page after they next sign in. Quality Control Managers have it already.

THE FDA FOOD TRACEABILITY RULE

The rule (FSMA section 204, 21 CFR Part 1, Subpart S) applies to the foods on the FDA's Food Traceability List, which includes fresh tomatoes, peppers, cucumbers, leafy greens, herbs, melons, tropical tree fruits, sprouts, and fresh-cut fruits and vegetables. Whoever grows, packs, ships, receives or transforms such a food keeps a record of each critical tracking event (CTE): harvesting, cooling, initial packing, shipping, receiving and transformation.

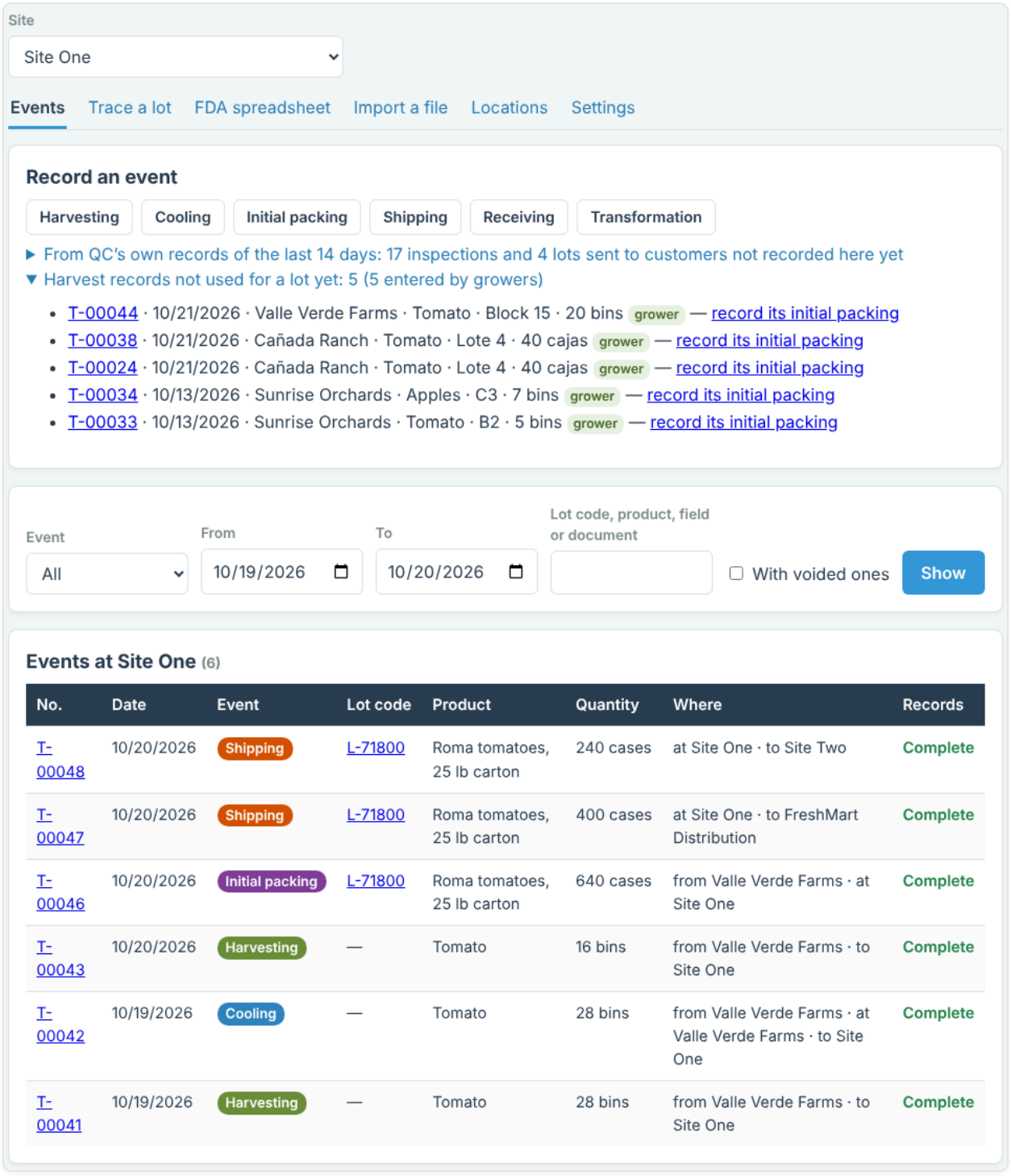
Each record holds the event's key data elements (KDEs): the traceability lot code (harvesting and cooling: the commodity and variety instead, there being no lot code yet), the product, the quantity and its unit, the date, the locations, and the reference document (such as a bill of lading or an invoice, by its type and number). Each location is given by its location description: the business name, phone, physical address (or, for a farm, its coordinates), city, state, zip code and country. Some events have more: an initial packing also has the field, the harvest date, the harvester, the cooling and what was received.

The traceability lot code is assigned when the food is first packed (initial packing) or made into a new lot (transformation): usually the QC lot number. It then travels with the lot: whoever ships it passes on the code and where it was assigned (the lot code's source), and whoever receives it records the same code. During an outbreak or a recall, the FDA can ask for the records of a food, as an electronic sortable spreadsheet, within 24 hours. The records are kept 2 years: nothing is deleted on this page.

The page has six tabs: Events, Trace a lot, FDA spreadsheet, Import a file, Locations and Settings (for Users, Food Traceability List). With more than one site, choose the Site first.

EVENTS

Events, where the page opens, has Record an event, what is waiting to be recorded, and the site’s events. The list shows the events of the last 30 days, newest first (up to 1,000): the No. (T-00001, numbered at each site), the Date, the Event, the Lot code (it opens the lot’s trace), the Product, the Quantity, Where (from, at and to) and Records: Complete, or how many key data elements are missing (point at it to see which). Choose an Event, the dates From and To, or type part of a Lot code, product, field or document (a document number, a customer’s or a farm’s name, a lot used also match), tick With voided ones to see those too, and select Show.



Events: recording an event, what is waiting, and the list

Record an event has a button for each kind of event:

- Harvesting: a harvest from a grower's field, and who it went to: the farm, the Field or growing area, who harvested it (when not the farm) and who it was Delivered to. It has no lot code yet.

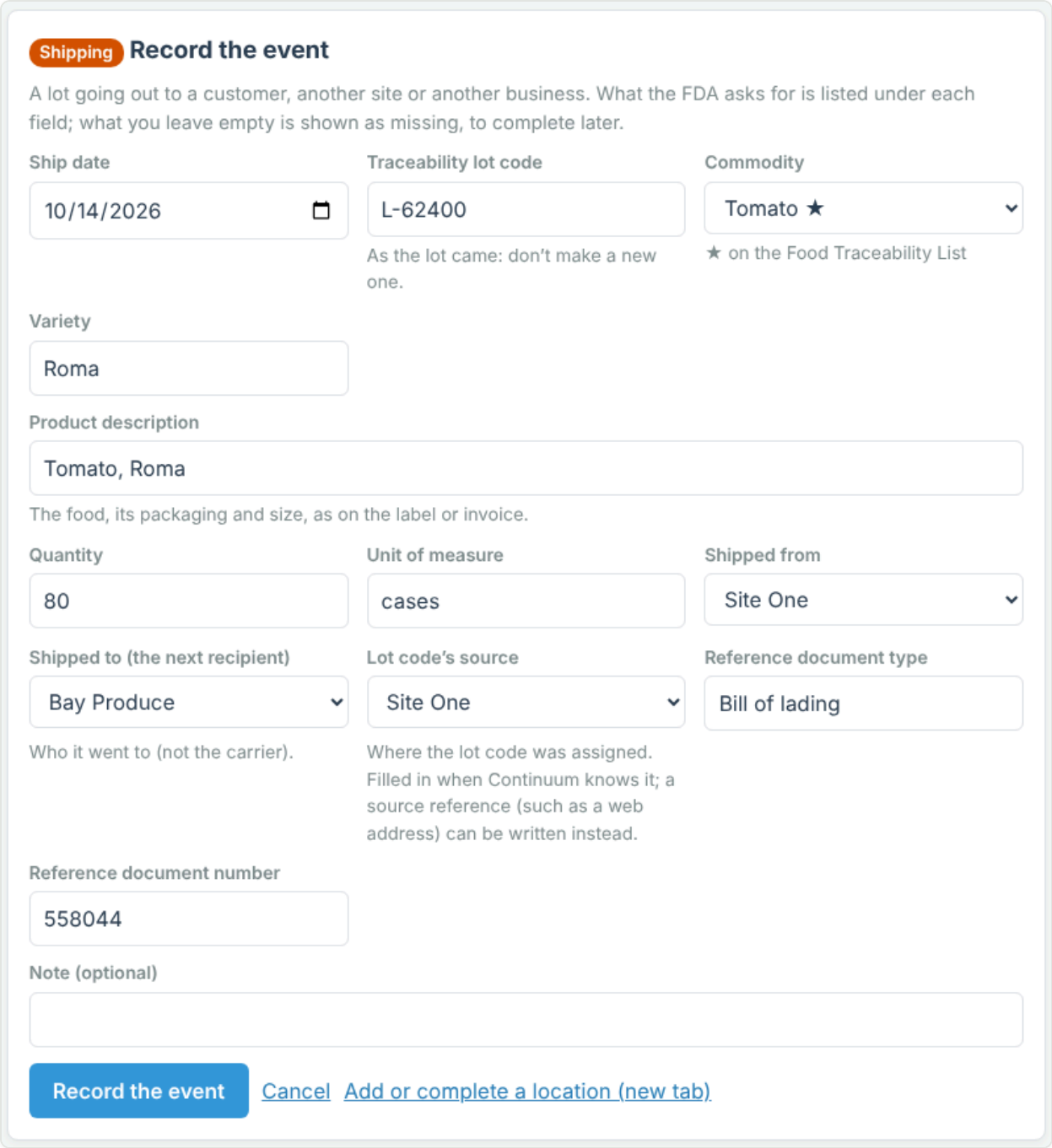
- Cooling: cooling before initial packing (hydrocooling, forced air, icing…): the farm, where it was Cooled at and who it was delivered to.
- Initial packing: the first packing of product from the field, where the traceability lot code is assigned: the farm, where it was Packed at (the lot code's source), where it was cooled (if it was), the field, the harvest date, the harvester (business name and phone), the cooling date, and the date, quantity and unit received.
- Shipping: a lot going out to a customer, another site or another business: Shipped from, Shipped to (the next recipient, not the carrier) and the Lot code's source.
- Receiving: a lot arriving from another business or another site: Received from (the previous source, not the carrier), Received at and the Lot code's source.
- Transformation: repacking, relabeling, commingling or cutting, where one or more lots make a new lot: the New traceability lot code, the New product description, the Quantity of the new lot, where it was Transformed at (the new lot code's source), and the Lots used, each with its lot code, product and the quantity used from it.

RECORDING AN EVENT

1. Under Record an event, select the kind of event.
2. Check the date (Harvest date, Cooling date, Packing date, Ship date, Receipt date or Date completed; the site's today to start with) and type the Traceability lot code (none for harvesting and cooling; for a transformation, the New traceability lot code).
3. Choose the Commodity (★ marks those on the Food Traceability List), and type the Variety and the Product description: the food, its packaging and size, as on the label or invoice (Roma tomatoes, 25 lb carton).
4. Type the Quantity and the Unit of measure (the site's unit to start with).
5. Choose each location from its list (The company's sites, the site's Customers, its Growers and the Other businesses on Locations), or choose — written out below — and type it: name, address, city, state, zip, country and phone.
6. Fill in the kind's other fields, the Reference document type and the Reference document number, and a Note if you want. Bill of lading, Invoice, Packing slip,

Purchase order, Advance ship notice, Receiving log, Harvest log and Production record are offered as you type; shipping and receiving start with the site's type.

7. For a transformation, type each lot used under Lots used: its Lot code, Product, Quantity used and Unit (Another lot adds a row; up to 50 lots).
8. Select Record the event.



A shipping event started from a lot sent to a customer

What the FDA asks for is listed under each field. Only a few things are required, each with its message: the date (Enter the date.; The date can't be after tomorrow.), the lot code (Enter the traceability lot code.), the quantity as a number with up to 3 decimals and its unit, the farm for harvesting, cooling and initial packing (Say the farm (the grower) where it was harvested.), who it was shipped to (Say who it was shipped to.) or received from (Say who it was received from.), and for a transformation at least one lot used, each with its lot code, and not the new lot's code. Everything else may be left empty: it isn't refused, it is listed as missing on the event and in the spreadsheet, to complete later. The event gets its number and opens: The event was recorded.

> **Tip:** For shipping and receiving, leave Lot code's source as it is: when Continuum knows where the code was assigned (the initial packing or transformation recorded at your sites, or an earlier shipment or receipt of the lot), it is filled in when the event is recorded; a receiving with nothing recorded before takes the business it came from, when chosen from the list. A source reference, such as a web address, can be written instead.

STARTING FROM QC'S OWN RECORDS

Under Record an event, From QC's own records of the last 14 days lists what the site recorded elsewhere but not here yet (it opens by itself with 8 or fewer): Inspections (lots received), each with Initial packing and Receiving, and Lots sent to customers (Customer Specifications) (see 6.24), each with Shipping. An inspection leaves the list once an initial packing or a receiving event names it, and a lot sent to a customer once a shipping event does.

- Initial packing or Receiving from an inspection opens the form with the inspection's date, its lot number as the traceability lot code, the commodity, the variety, the product (commodity, variety and packaging), the site as where it happened, and the grower as the farm (or as Received from); an initial packing also gets the Date received and, as the Harvester, the farm's name, address and phone.

- Shipping from a lot sent to a customer opens it with the day it went, the lot number, the customer as Shipped to, the inspection's product and the lot code's source when Continuum knows it.

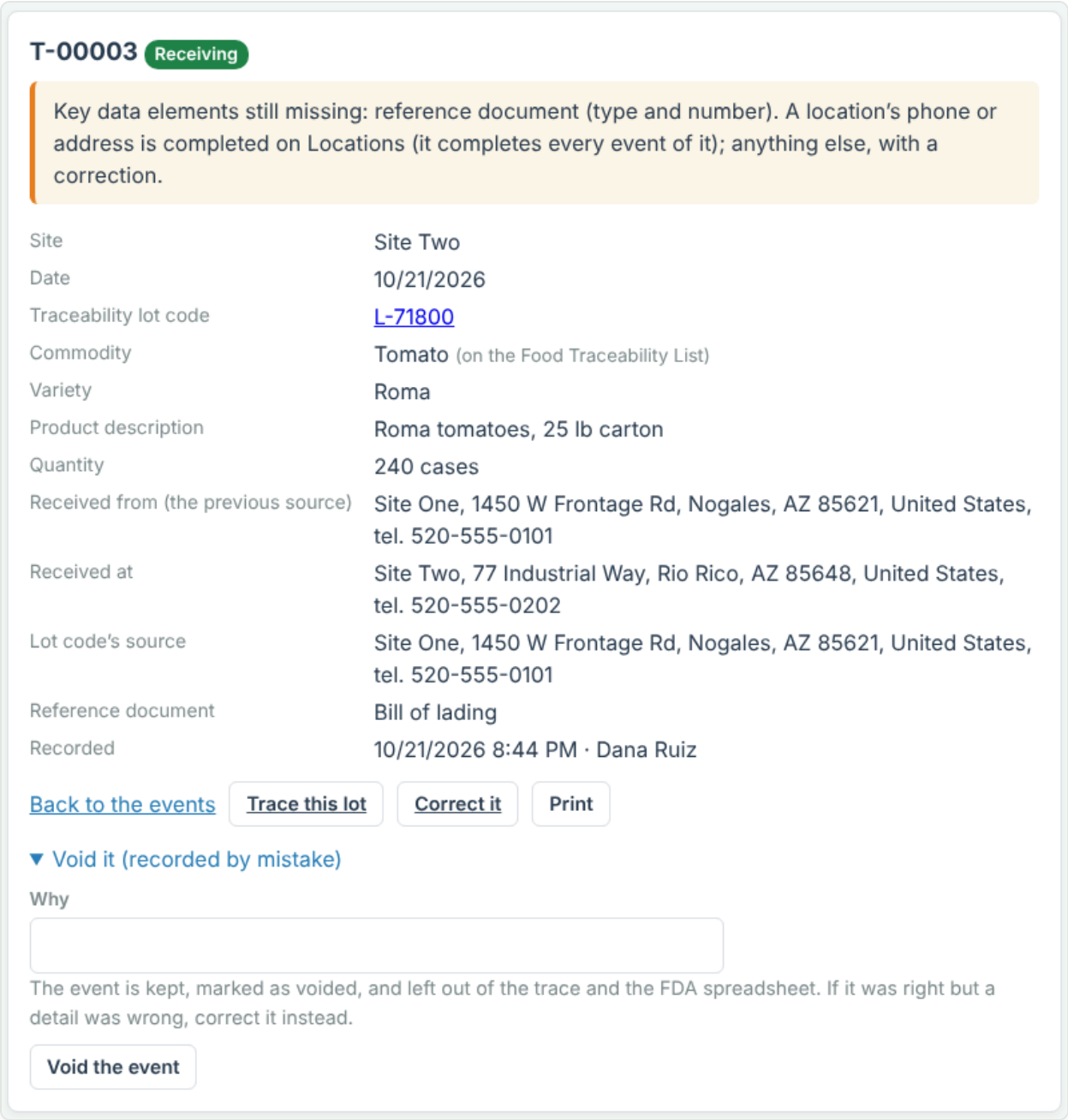
Check the rest, type the quantity and the reference document number, and select Record the event. The event shows the inspection it came from (QC inspection).

> **Note:** The lots of a shipment get their shipping events when the shipment is recorded, if the site's Shipments settings say so, or, for a shipment dated after tomorrow, each morning, on the server, the day before it goes (see 6.70). A lot of a shipment without one, such as a lot recorded without cases, is listed here with the lots sent to customers.

> **Tip:** Today (see 6.60) counts the inspected lots, the lots sent to customers and the harvest records not recorded in Traceability yet.

AN EVENT: WHAT IS MISSING, CORRECTING AND VOIDING

An event's number opens it: everything recorded, each location with its location description, when it was Recorded and by whom (from a file, entered by the grower (Harvest Records), or made from a shipment), the QC inspection it came from, and its History. At the top, Key data elements still missing lists what the records lack, or Every key data element of this event is recorded. A location's phone or address is completed on Locations, which completes every event that names it; anything else, with a correction. Trace this lot opens the lot's trace, and Print prints the event.



An event with a key data element missing, and voiding it

Quality Control Managers correct an event that happened but has something wrong:

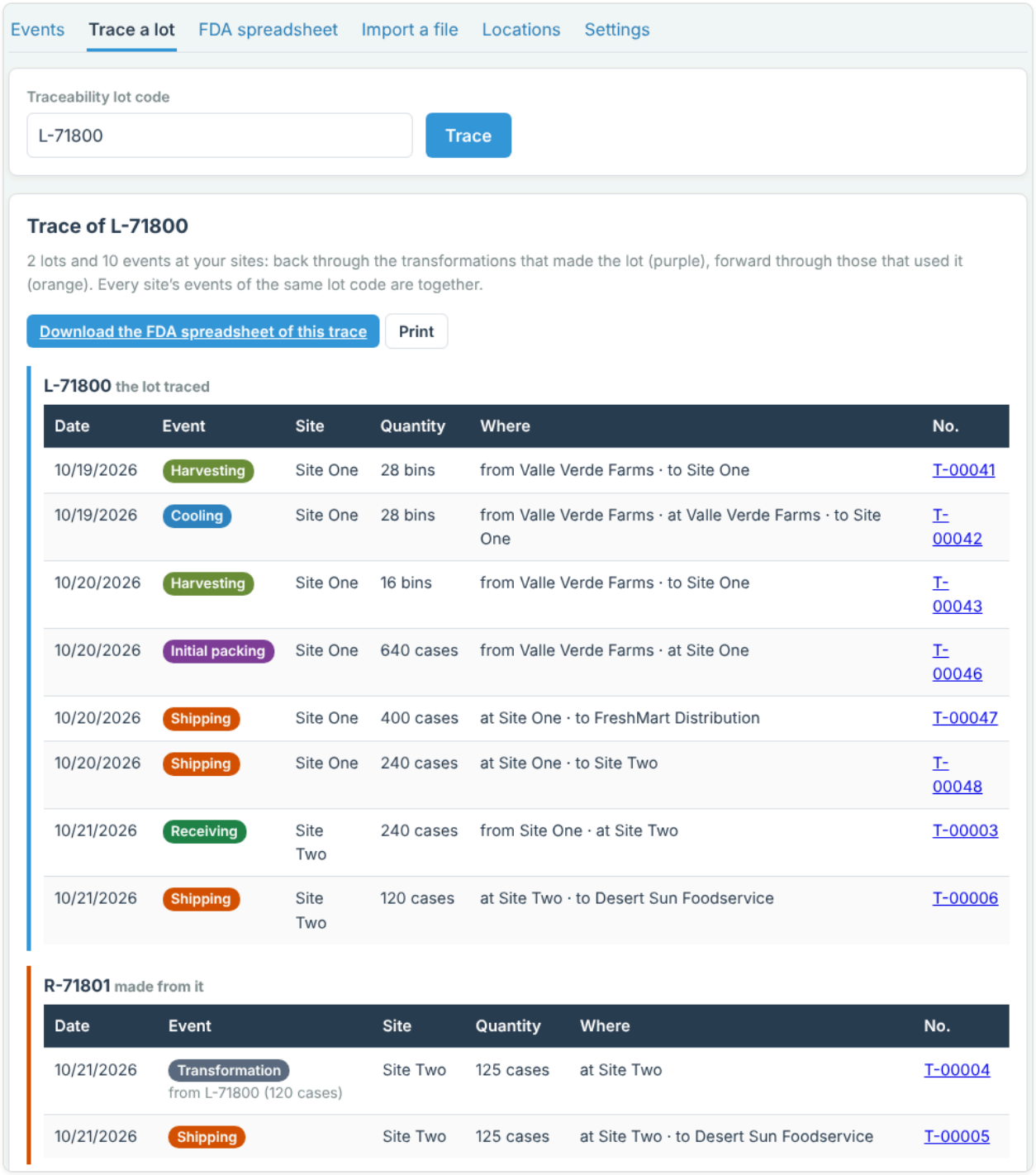
1. Select Correct it on the event.
2. Change what was wrong, and type What was wrong (kept with both events).
3. Select Record the correction.

The correction is a new event with its own number (This corrects T-00012); the event it corrects is voided and kept, with Corrected by and the reason: The correction was recorded; the event it corrects is voided and kept. What used the corrected event, such as an initial packing that used a harvest record, uses the correction. If someone changed the event first, the page says Someone changed this event first: look at it again.

> **Note:** An event recorded by mistake (twice, at the wrong site…) is voided by a Quality Control Manager: open Void it (recorded by mistake), type Why and select Void the event. It is kept, marked Voided with when, who and why, and left out of the trace and the FDA spreadsheet; the list shows it struck through with With voided ones. Voiding a harvest record also voids the grower's cooling record of it; a harvest record an initial packing used can't be voided (An initial packing used this harvest record: it can't be voided. Void or correct that packing first, or correct this record.). A shipping event made from a shipment is voided with the same reason when the shipment is voided, its load cancelled or the lot's record removed on Customer Specifications (see 6.70). An event already sent to another system (see 6.63) is listed there as Changed after sending, to correct it in that system too.

TRACE A LOT

Trace a lot follows a lot through the company's sites you have with QA: type its Traceability lot code and select Trace. A lot code on the Events list or on an event (Trace this lot) opens it too.



The trace of a lot across two sites

Trace of says how many lots and events were found. Each lot comes with its events: Date, Event, Site, Quantity, Where and the event's No. First, marked in purple, come the lots used to make it (back through its transformations, the earliest first); then the lot traced, with every event of its lot code at each of your sites and the harvest and cooling records its initial packing used (see 6.62); then,

marked in orange, the lots made from it (forward through the transformations that used it). A lot with no event at your sites (it came from another business) says so. Voided events are left out. The trace follows up to 12 transformations each way and 200 lots (Only the first 200 lots are shown.).

Below come QC's own records of this lot code: the inspections with that lot number in the last 3 years and the lots recorded as going to a customer on Customer Specifications. When the company reads USDA Market News, the prices around the lot's shipments follow (see 6.63). Download the FDA spreadsheet of this trace gives the spreadsheet of every event of the trace, whatever the commodity (see FDA Spreadsheet, below); Print prints the trace.

FDA SPREADSHEET

FDA spreadsheet makes the electronic sortable spreadsheet the FDA can ask for within 24 hours during an outbreak or a recall (21 CFR 1.1455(c)(3)):

1. Type a lot code under A lot's trace (lot code), for that lot's trace at all your sites, or leave it empty for every event between From and To (the last 30 days to start with).
2. Leave Only commodities on the Food Traceability List ticked, or untick it for every commodity. An event recorded without a commodity (shipping, receiving and transformation allow it) is judged by its lot: it is left out only when another event of the same lot code (or of a lot it used) has a commodity, and none of them is on the list.
3. With more than one site, tick All my sites to take the period's events of every site you have, not only the site chosen.
4. Select Download the spreadsheet.

The file (Traceability L-71800.csv, or Traceability 2026-09-22 to 2026-10-21.csv) opens in Excel or any spreadsheet program, where it sorts by any column. It has one row per event, oldest first (a transformation has one row per lot used), up to 50,000 rows, with its headings in English, the FDA's language: the event number and the critical tracking event, the date, the traceability lot code and its source, the commodity and whether it is on the Food Traceability List, the variety, the product, the quantity and unit, the lot used, the name and location description of the immediate previous source or farm, of the location of the event and of the

immediate subsequent recipient, the field, harvest date, harvester, cooling location and date, the date, quantity and unit received, the reference document, the site, the Key data elements missing, when and by whom it was recorded, and the note. A lot's harvest and cooling records show the lot code they were packed into. A typed text that would start a formula is kept as text. Each download is recorded in the History of Settings.

> **Note:** With Only commodities on the Food Traceability List ticked and no commodity marked on the list yet, the spreadsheet is empty, and the tab says so. A Quality Control Manager marks the commodities on Settings (see below).

IMPORT A FILE

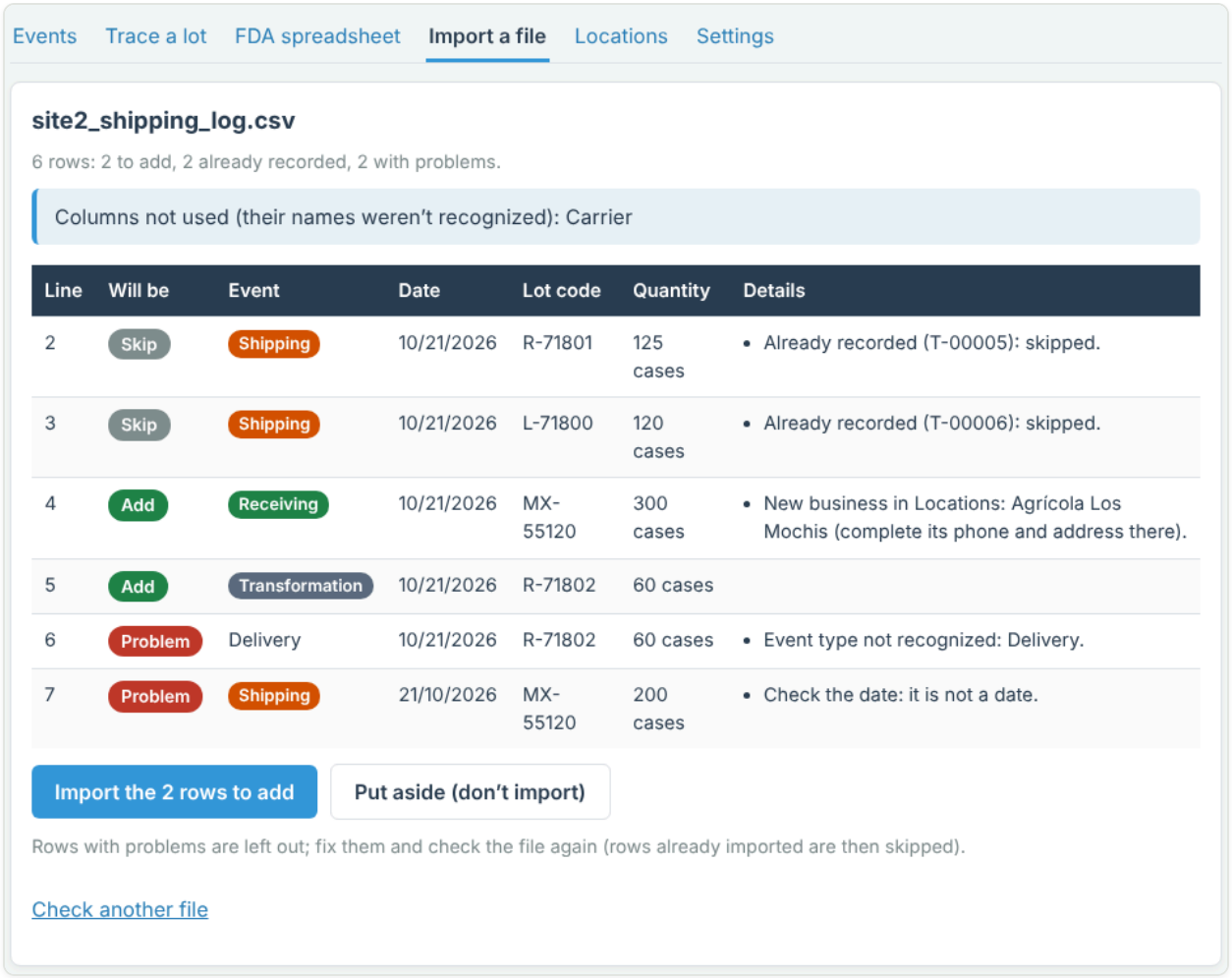
Import a file records many events at once from another system, such as a shipping or receiving log. Everyone who can record events at the site can import:

1. Select Download the template: a CSV file with the columns' names in your language.
2. Fill in one row per event, any kind of event in the same file, and save it as CSV (in Excel: File > Save As > CSV UTF-8).
3. Under CSV file, choose the file (at most 1 MB and 2,000 rows; a longer one gets The file has more than 2000 rows: split it into smaller files.) and select Check the file. Nothing is imported yet.
4. Look at each row and what will be done with it, then select Import the 2 rows to add (the number the check found), or Put aside (don't import).

The columns are Event, Date, Traceability lot code, Commodity, Variety, Product description, Quantity, Unit, Received from or farm, Shipped or delivered to, Where (shipped from, received at, packed, cooled, transformed), Lot code source, Field, Harvest date, Harvester, Cooled at, Cooling date, Date received, Quantity received, Unit received, Lots used, Reference document type, Reference document number and Note. Their Spanish names and other usual names (Lot, TLC, Qty, Ship to, Farm, Grower…) are understood too, in any order. Only Event

and Date are needed (The file has no “Date” column.); a column whose name isn’t recognized is listed and not used.

Event is Harvesting, Cooling, Initial packing, Shipping, Receiving or Transformation, in English or Spanish (Harvest, Ship, Receipt, Repack... too). Dates are YYYY-MM-DD or MM/DD/YYYY. Locations are named as they are in Continuum: a site, a customer, a grower or a business on Locations; Where left empty is this site. A name not found becomes a new business in Locations when the file is imported, to complete there (under Lot code source, it is kept as a written source reference instead). Lots used by a transformation are written “code: quantity unit; code: quantity unit”. An empty Unit takes the site’s unit, an empty document type of a shipping or receiving row the site’s type, and an empty lot code source of a shipping or receiving row is filled in as on the form: where Continuum knows the code was assigned or, for a receiving row with nothing recorded for its code, the Received from business when it is on Locations (not a new name).



A file checked, before importing it

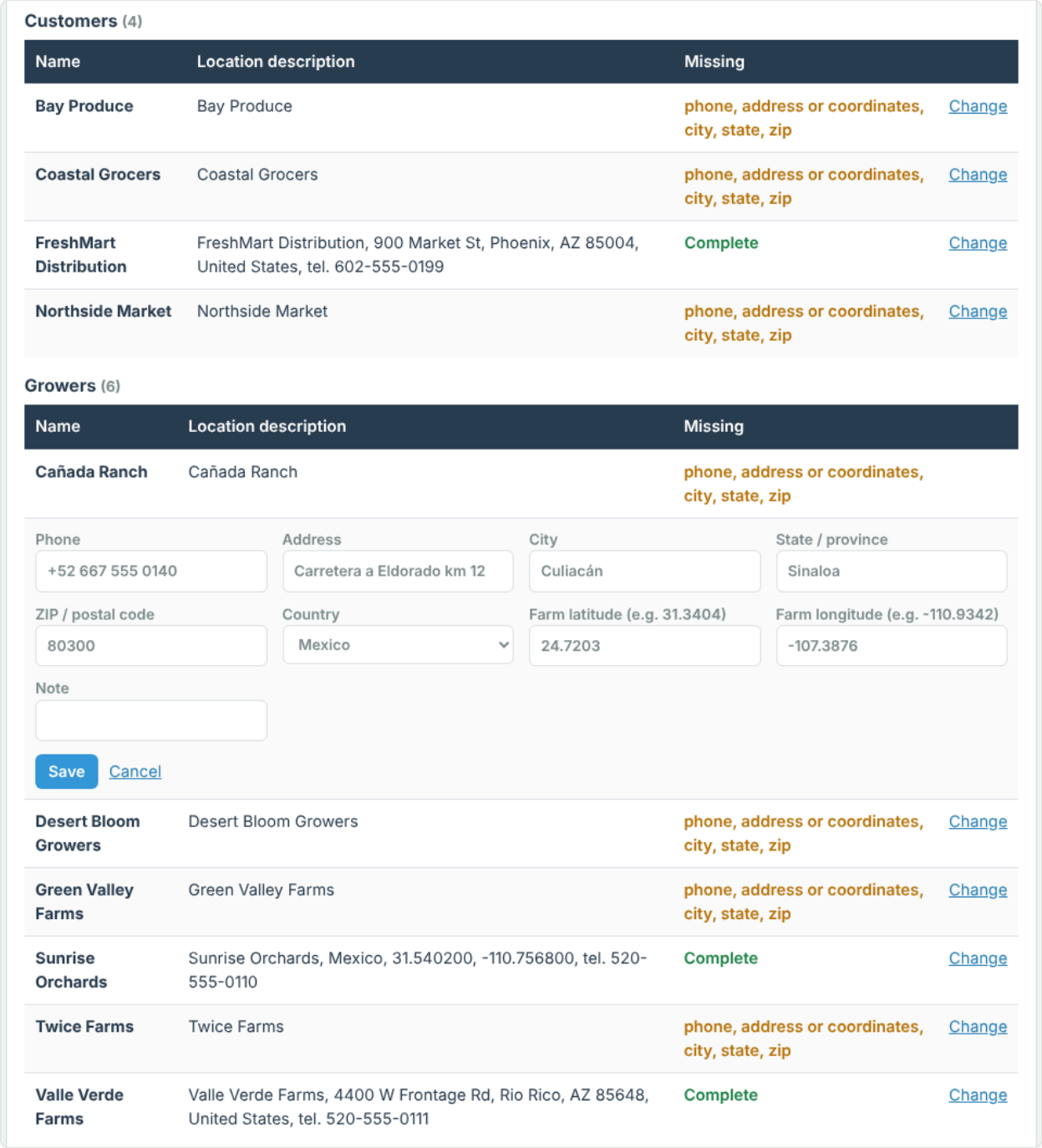
The check shows how many rows will be added, are already recorded and have problems, and what will be done with each row: Add (with notes, such as a new business in Locations); Skip, when the site already has an event of the same kind, date, lot code, quantity and document number, or an earlier row is the same (Already recorded (T-00005): skipped.); or Problem, with the reason (Event type not recognized: Delivery.; Check the date: it is not a date.; Commodity not found: …), by the same rules as the form. Rows with problems are left out: fix them in the file and check it again; the rows already imported are then skipped.

Importing checks each row again and records it: Imported. Each row's outcome is below. (Added, with its event; Skipped; or Not imported, with why). The events show from a file. Files lists the files checked, when and by whom, their rows and where they stand: Checked, waiting; Imported: 2 added; or Put aside. A file is imported only once.

When a column isn’t found, or the file writes its dates day/month, open the columns under the check, choose each field’s column and how dates like 03/04/2026 are written, and select Check again: the file is checked again without sending it, and the columns are kept for the site’s next file. A file without its Event or Date column is kept and opens on its columns. The same import can run every night on the server from a folder the shipping or receiving system writes to: Continuum support sets it up.

LOCATIONS

Each event names its locations, and the FDA asks for each one’s location description. Locations lists them for the site, each with its Location description and what it still lacks (Missing: phone, address or coordinates, city, state, zip) or Complete: The company’s sites, which use their own address and phone on Add / Change Sites (3.2); Customers, the site’s customers on Customer Specifications (6.24), whose address there is used until one is given here; Growers, the site’s grower list; and Other businesses (packers, coolers, brokers, distributors…), added here or by an imported file.



Locations: what each customer and farm lacks, and a farm being completed

Quality Control Managers complete them: select Change on a customer, a grower or a business; type the Phone, Address, City, State / province, ZIP / postal code and Country (United States, Canada or Mexico), for a farm without a street address its Farm latitude and Farm longitude (both or neither, in decimal degrees), and a Note if you want; and select Save. Completing a location completes every event that names it, those already recorded too. Add another business (packer,

cooler, broker, distributor…) adds one with its Business name. A business no longer used is ticked No longer used (kept for the events that name it): it stays on its events, struck through on the list, and is no longer offered on the form.

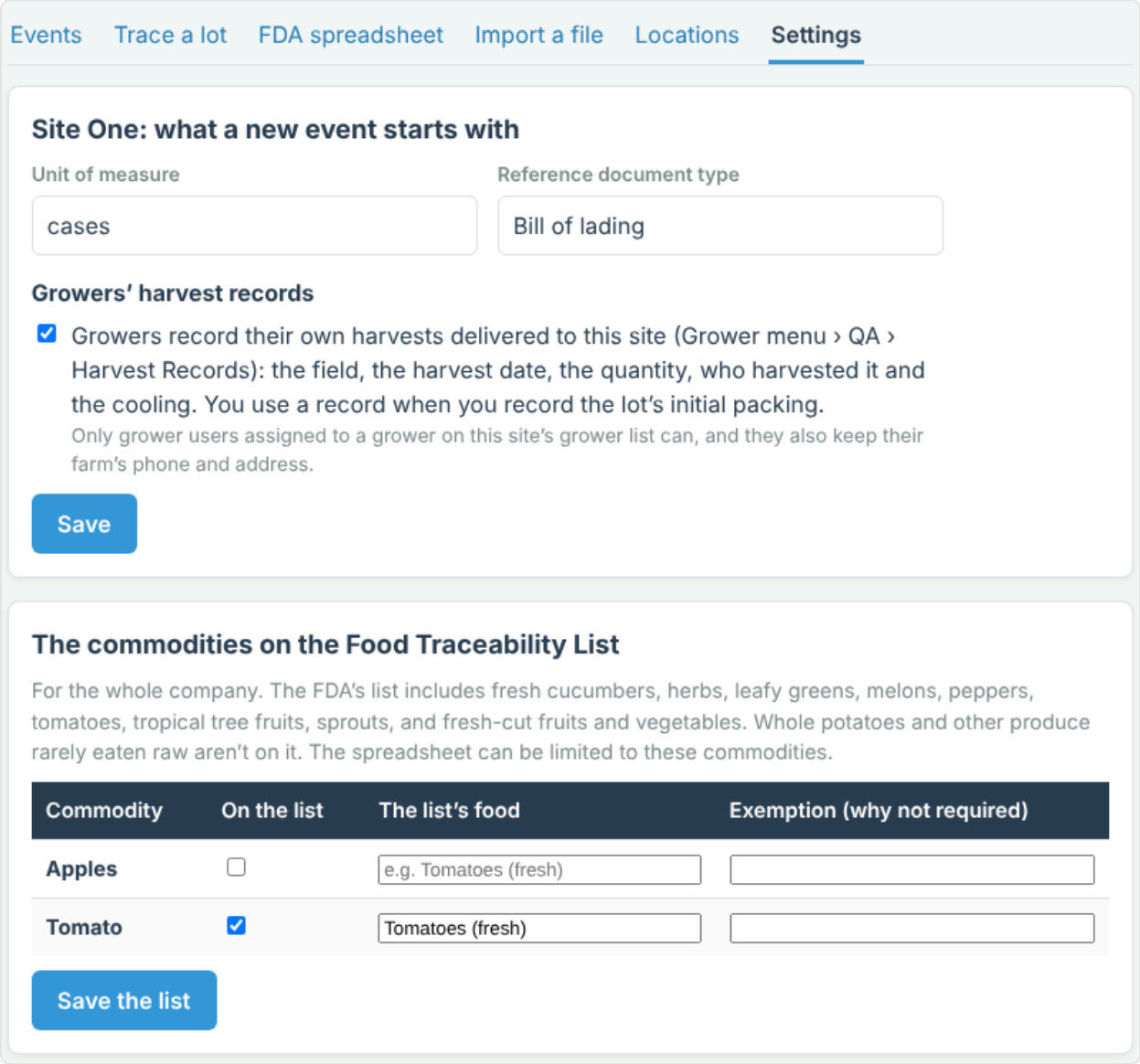
Import from a file, next to Add another business, adds businesses and completes the locations' empty fields from a file (name, phone, address, city, state, ZIP, country, a farm's coordinates); nothing already filled is replaced. Next to the events, the site can also import its growers' harvest records from a file. See 6.73.

> **Note:** Locations are kept for each site. Growers who record their own harvests keep their farm's phone and address themselves, for each site they deliver to (see 6.62).

SETTINGS AND THE FOOD TRACEABILITY LIST

Settings, for Quality Control Managers, says what a new event at the site starts with: the Unit of measure (such as cases; for an initial packing, the Unit received too) and the Reference document type of shipping and receiving events (such as Bill of lading); an imported row without them takes them too. Under Growers' harvest records, tick Growers record their own harvests delivered to this site to let the growers on the site's grower list record them (see 6.62). Select Save.

> **Note:** The shipping events made from shipments take their unit and reference document type from the Settings of Shipments instead (see 6.70).



The site's settings and the Food Traceability List

The commodities on the Food Traceability List is for the whole company: for each commodity, tick On the list, type The list's food (such as Tomatoes (fresh)) and, for one not required, the Exemption (why not required), and select Save the list (Saved: 2 commodities changed.). On the event form the commodities on the list show a ★, an event of one says on the Food Traceability List, and the spreadsheet can be limited to them. Users see the list on their Food Traceability List tab, without changing it.

Note: History, below, lists the latest things done at the site and on the list: events recorded, voided and corrected, files imported, locations and settings saved, commodities changed and spreadsheets downloaded (with their rows).

Tip: Site Setup (see 6.58) sets the unit, the document type and the growers' harvest records for many sites at once.

THE HARVEST CHECK (CANADAGAP)

At a site that follows CanadaGAP, a harvest event, and an initial packing typed without harvest records, is checked against the earliest acceptable harvest date (EAHD) of its production site (see 6.77), when the event's field is a production site on Agronomic Inputs. A harvest dated before it isn't recorded at first: the page says Harvest on (the date) is before the earliest acceptable harvest date (the EAHD) of this production site, and asks Why it was harvested before the earliest acceptable harvest date. Type the reason and record again: the harvest is recorded, and the reason is kept for Form P2 and listed on Agronomic Inputs > Harvests before the EAHD.

Note: When the site's CanadaGAP settings refuse a harvest before the EAHD (see 6.75), the page says This site doesn't record a harvest before that date (CanadaGAP Programme, Settings), and the harvest isn't recorded: check the date, or the applications of the production site.

At a site that follows Mexico, the same check uses the field's safety interval, from its pesticide applications (see 6.77), and the site's SENASICA settings (Harvest before the safety interval ends: Ask for a reason, or Refuse it; see 6.82).

6.62 Growers' Harvest Records

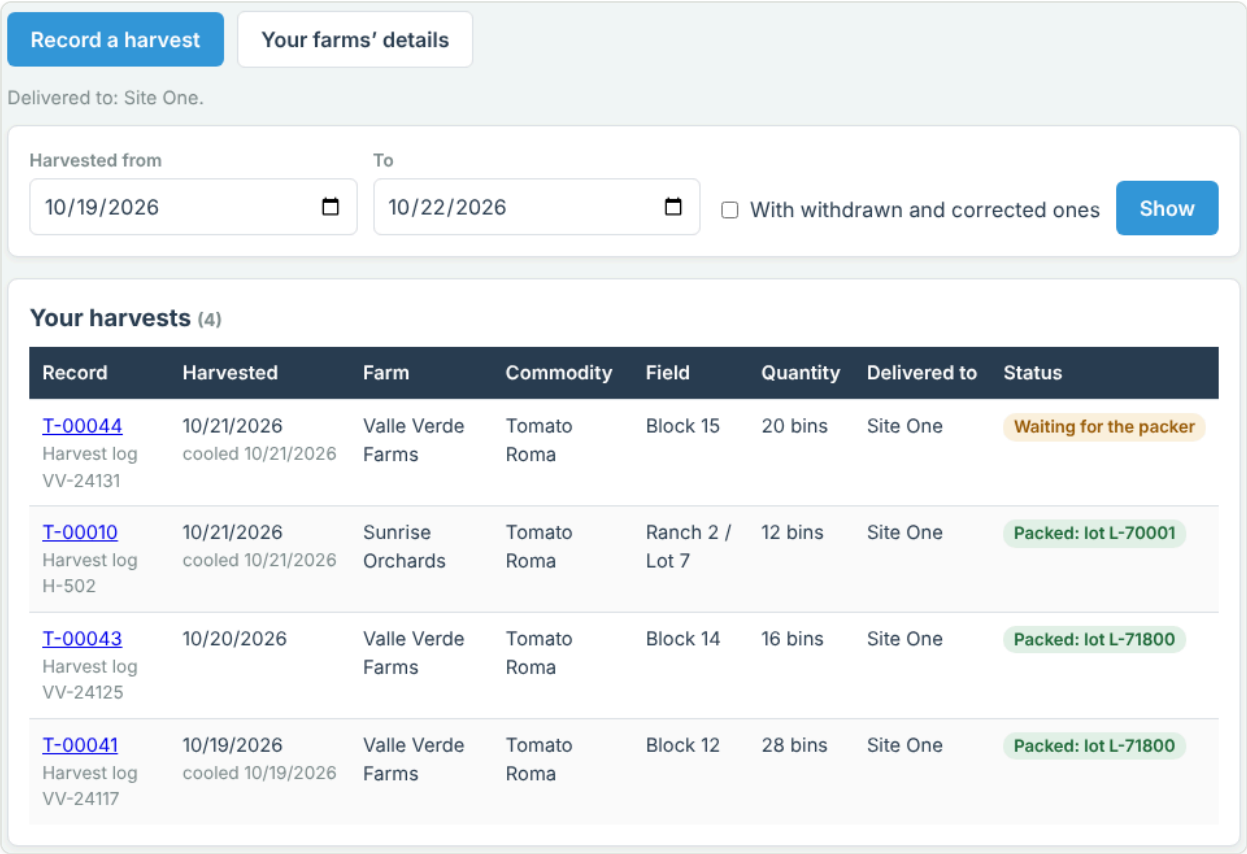
Under the FDA Food Traceability Rule, the farm passes on to the packer what the lot's initial packing record needs: the field and the day it was harvested, how

much, who harvested it, and its cooling. With growers' harvest records, the growers record that themselves on Grower menu > QA > Harvest Records, for each harvest delivered to a site, and the site uses each record when it records the lot's initial packing on Traceability Events (see 6.61). Each site turns it on in its Traceability settings; the grower menu shows Harvest Records once a site of the company has it on.

Who	What they do
Growers (grower users)	Record the harvests of their farms delivered to the sites that take them, with the cooling; correct or withdraw a record until the site uses it; keep their farm's phone and address; see which lot each harvest was packed into.
Everyone with the Traceability permission at the site	See the harvest records not used for a lot yet, and use them when recording a lot's initial packing.
Quality Control Managers	Turn the growers' harvest records on for the site; correct a harvest record, also once it is used, and void one no initial packing uses.

THE GROWER'S HARVEST RECORDS

A grower user records for the growers assigned to their user (Assign Grower User to Grower, 3.3), at the sites with QA whose grower list has one of them and that take the records: Delivered to lists those sites. Without one, the page says so (No grower is assigned to your user yet. Ask your quality control contact to assign one.; None of the sites you deliver to takes harvest records from growers yet. Your quality control contact turns it on.).



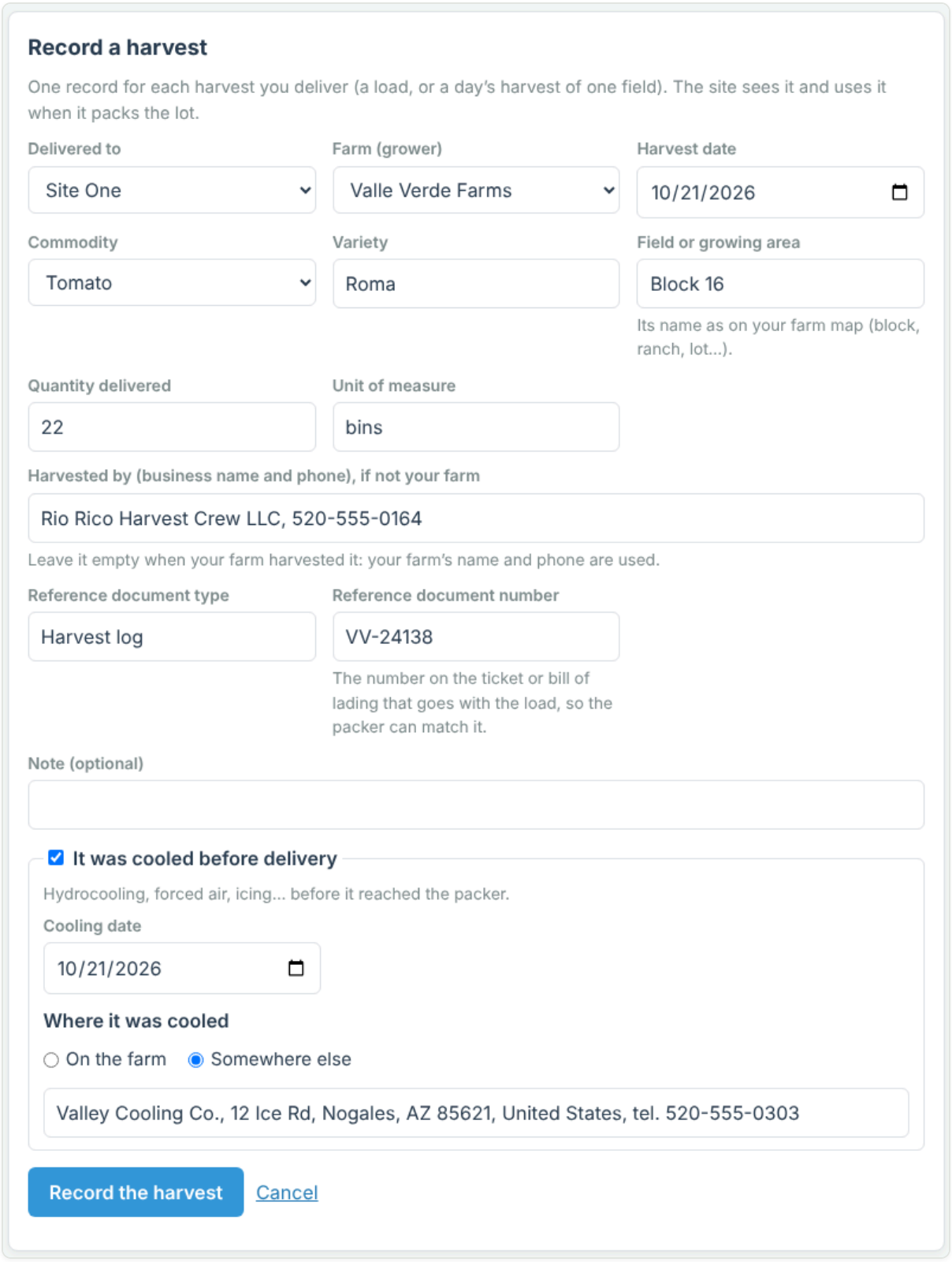
The grower's harvests: waiting for the packer, packed into a lot

Your harvests lists the records of the last 60 days (choose Harvested from and To, tick With withdrawn and corrected ones if needed, and select Show): the Record number (numbered at the site) with its document, the day it was Harvested (and cooled), the Farm (with more than one), the Commodity, Field, Quantity, Delivered to, and the Status: Waiting for the packer; Packed: lot L-71800 once the site used it for a lot's initial packing; Corrected; or Withdrawn. Harvests of the farm recorded by the site show too (recorded by the site).

> **Note:** Your farm's details (Your farms' details, with more than one farm) keeps the farm's Phone, Physical address, City, State or province, Zip or postal code, Country and, if you want, its Latitude and Longitude: select Save. They are saved for each site you deliver to, and every harvest record of the farm uses them. While the phone or address is missing, the list says Your farm's phone or address is missing, with Complete it. The farm's name is the grower's name in Continuum: the site changes it.

RECORDING A HARVEST

1. Select Record a harvest.
2. Choose where it was Delivered to and the Farm (grower), if there is more than one (a farm can only be delivered to the sites whose grower list has it).
3. Check the Harvest date, choose the Commodity, and type the Variety and the Field or growing area (its name as on your farm map: block, ranch, lot…).
4. Type the Quantity delivered and its Unit of measure (such as bins).
5. If someone else harvested it, type Harvested by (business name and phone), if not your farm; leave it empty when your farm did: your farm’s name and phone are used.
6. Type the Reference document type and number: the number on the ticket or bill of lading that goes with the load, so the packer can match it.
7. If it was cooled before delivery, tick It was cooled before delivery, type the Cooling date, and choose On the farm or Somewhere else (then type the cooler’s name, address, city, state, zip, country and phone).
8. Select Record the harvest.



Recording a harvest, cooled before delivery

One record per harvest delivered: a load, or a day's harvest of one field. A new record starts like your last one: the same site, farm, commodity, variety, unit and

document type. The harvest date, the commodity, the field, the quantity and its unit are needed, the dates can't be after tomorrow, and the cooling can't be before the harvest; with Somewhere else, say where it was cooled. The site sees the record at once: The harvest was recorded. The site sees it and uses it when it packs the lot.

The record's number opens it: the farm with its address and phone, the dates, the commodity, field and quantity, Harvested by (The farm when empty), Cooled, Delivered to, the reference document, and what is Still missing for the FDA records. Until the site uses it, the grower can correct it (Correct it; type What was wrong (kept with both records); select Record the correction; it stays at the same site) or withdraw it (Withdraw it (recorded by mistake); type Why; select Withdraw the record). Both keep the old record, marked Corrected or Withdrawn, with its cooling. Once the site packed it, the record says Packed into lot L-71800 on 10/20/2026 (traceability lot code). To change this record now, ask the site.

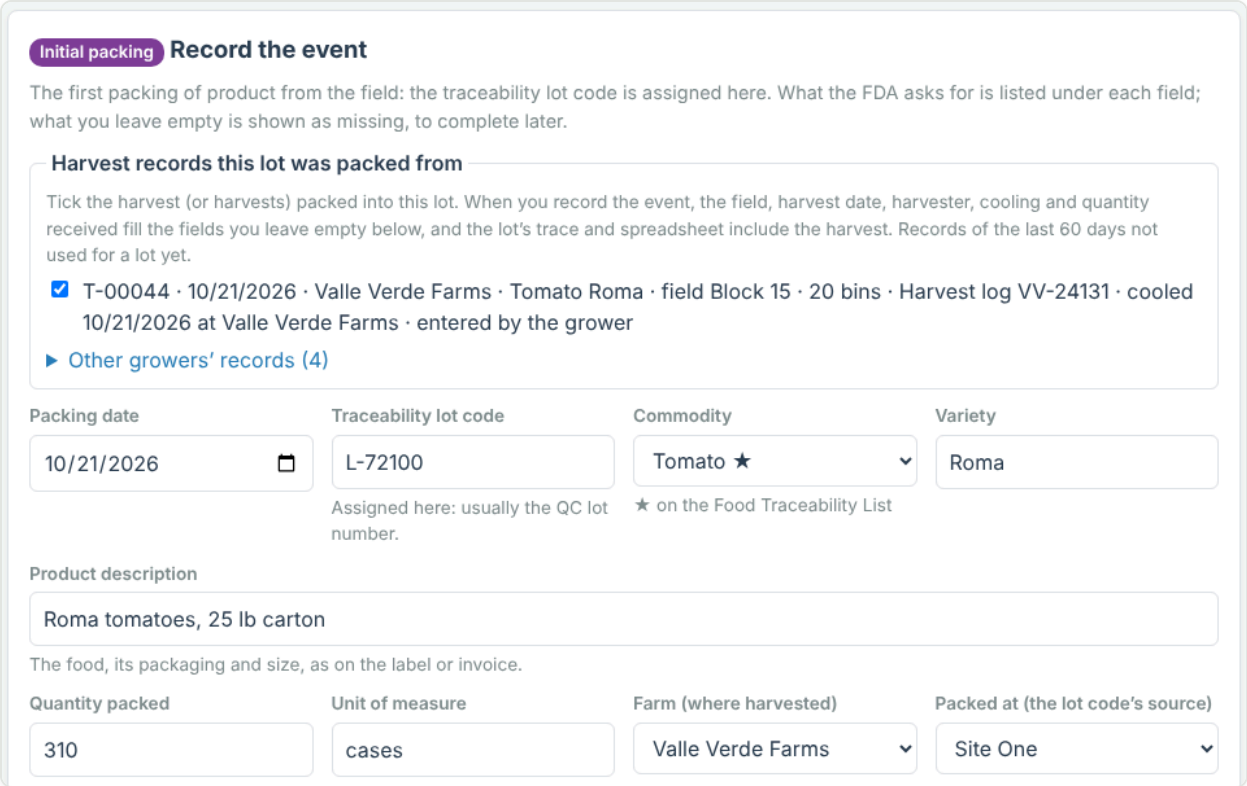
> **Note:** A grower can't change a record the site has packed (The site has already packed this harvest into a lot: ask them to correct it.), nor a harvest the site recorded itself: a Quality Control Manager of the site corrects it on Traceability Events (see 6.61).

USING THE RECORDS AT THE SITE

On Traceability Events, Events shows Harvest records not used for a lot yet: the harvest records of the last 60 days, the growers' (tagged grower) and those recorded at the site, newest first, each with record its initial packing. To use them:

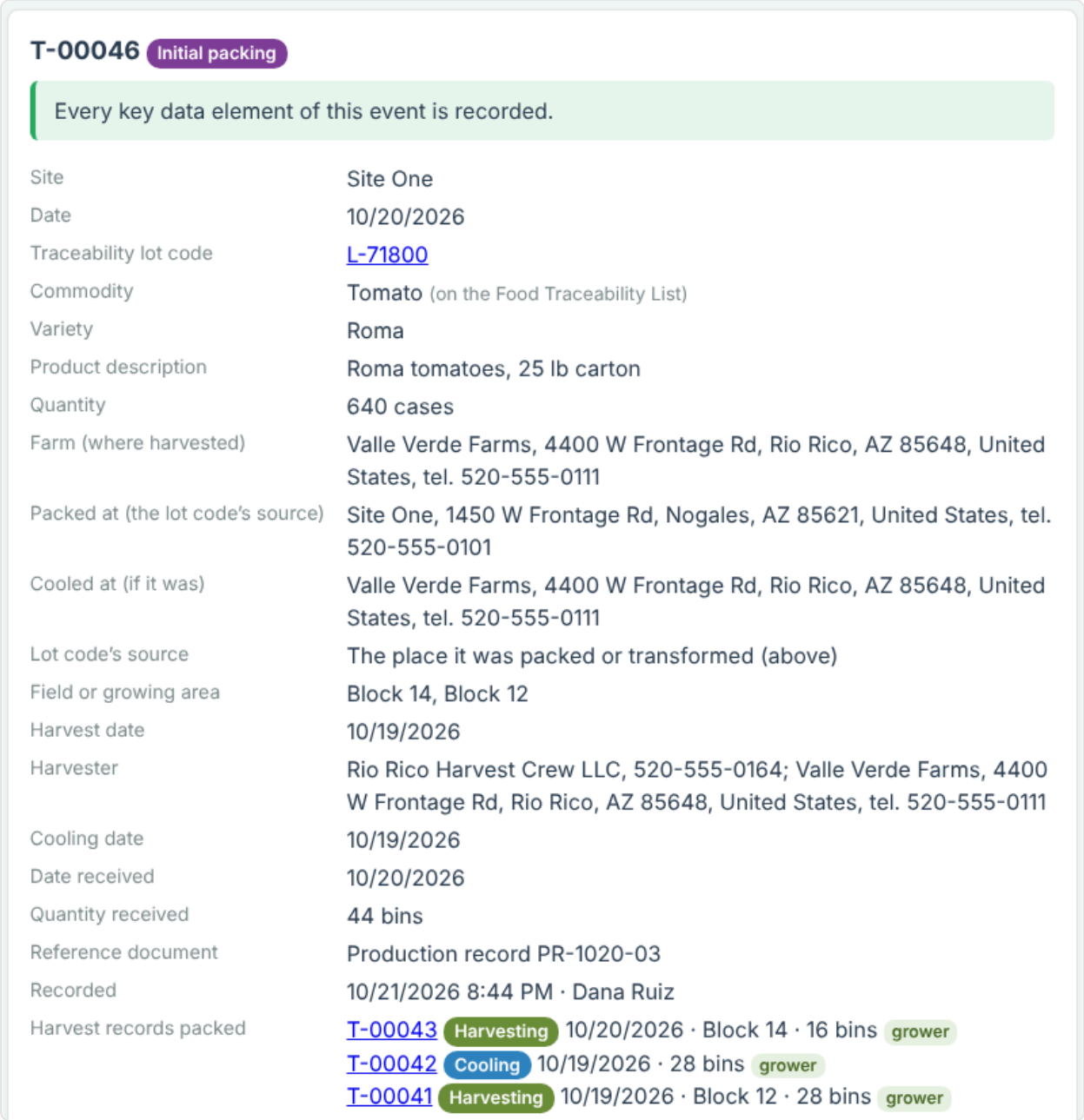
1. Select record its initial packing on a harvest record, or Initial packing under Record an event. The form opens with that record ticked, its farm and its commodity.
2. Under Harvest records this lot was packed from, tick each harvest packed into the lot. The records of the lot's farm come first; Other growers' records (Records of every grower, when none is of the lot's farm) opens the rest.
3. Type the Traceability lot code, the Product description, the Quantity packed, the Date received and the reference document. Leave empty what the harvest records give.

4. Select Record the event.



An initial packing started from a grower's harvest record

When the event is recorded, the harvest records fill the fields left empty: the farm, the commodity and variety, the Field or growing area (each record's field), the Harvest date (the earliest), the Harvester (each record's Harvested by, or the farm's name, address and phone when it is empty), the cooling (where and when the grower cooled it) and the Quantity received with its unit (their total, when all of them are in one unit). The records stay linked to the lot: the initial packing lists them under Harvest records packed, the lot's trace and spreadsheet include them, and the grower sees Packed: lot L-71800.



An initial packing filled from two harvest records

The rules:

- A harvest record is used by one initial packing only, at the site it was delivered to. One that another packing used, or the grower withdrew, meanwhile is refused (A harvest record you ticked is no longer available (another packing used it, or it was withdrawn): look at the list again.).
- The records ticked are of the lot's farm and commodity: T-00044 is the harvest of Valle Verde Farms, but this lot's farm is Cañada Ranch: tick that farm's

harvest, or change the farm.

- The form offers the records of the last 60 days. For an older one, open the harvest record (choose Harvesting under Event, and its dates) and select Record the initial packing of it.
- A harvest record's page shows Used for a lot, with the initial packing and its lot code, or Not yet, and the grower's cooling record of it (Cooled).

> **Note:** Correcting the initial packing keeps its harvest records ticked; when the records ticked change, what the old ones filled (and wasn't changed since) is filled again from the new ones. A Quality Control Manager corrects a harvest record on Traceability Events, also once it is used: the correction stays linked to the lot. A harvest record is voided only while no initial packing uses it (An initial packing used this harvest record: it can't be voided. Void or correct that packing first, or correct this record.), and voiding it also voids the grower's cooling record of it.

HARVESTS BEFORE THE EAHD (CANADAGAP)

At a site that follows CanadaGAP, a grower's harvest is checked as on Traceability Events (see 6.61) against the field's earliest acceptable harvest date, which the grower sees on Grower menu > Agronomic Inputs (see 6.77). A harvest before it asks the grower Why it was harvested before the earliest acceptable harvest date, and is recorded with the reason; when the site refuses them, the page says The site doesn't accept a harvest before that date: check the date, or talk to the site.

At a site that follows Mexico, the same check uses the field's safety interval, from its pesticide applications (see 6.77), and the site's SENASICA settings (Harvest before the safety interval ends: Ask for a reason, or Refuse it; see 6.82).

6.63 Agency Connections

Traceability > Agency Connections sends the company's traceability events (see 6.61) to the systems its buyers ask it to use, such as FoodLogiQ, and reads USDA Market News prices. A connection is set up once for the company: the system, the

sites it covers, the company's login with that system and the columns of the system's own template. Every 15 minutes, on the server, each connection's files are made on its schedule, one per site and kind of event, and sent by SFTP, or made ready to download and upload by hand in the system's portal. Until a system administrator lets a connection send by itself, nothing leaves the company before a Quality Control Manager of the site or a system administrator has approved the file (its page shows its rows; a file that changed since it was shown isn't approved). It is in the Traceability menu, after Traceability Events.

Who	What they do
System administrators	Add and set up the connections (the sites, the login and the server's key or the API key, the schedule, the approval, the columns, the sites' own logins), test them and read Market News now; and all that Quality Control Managers do, at every site.
Quality Control Managers	For their sites: see how each connection is doing, make the files now, see every row of a file, approve, send now, try again or cancel it, mark it as uploaded or arrived, and mark the events changed after sending as corrected. See the Market News prices.

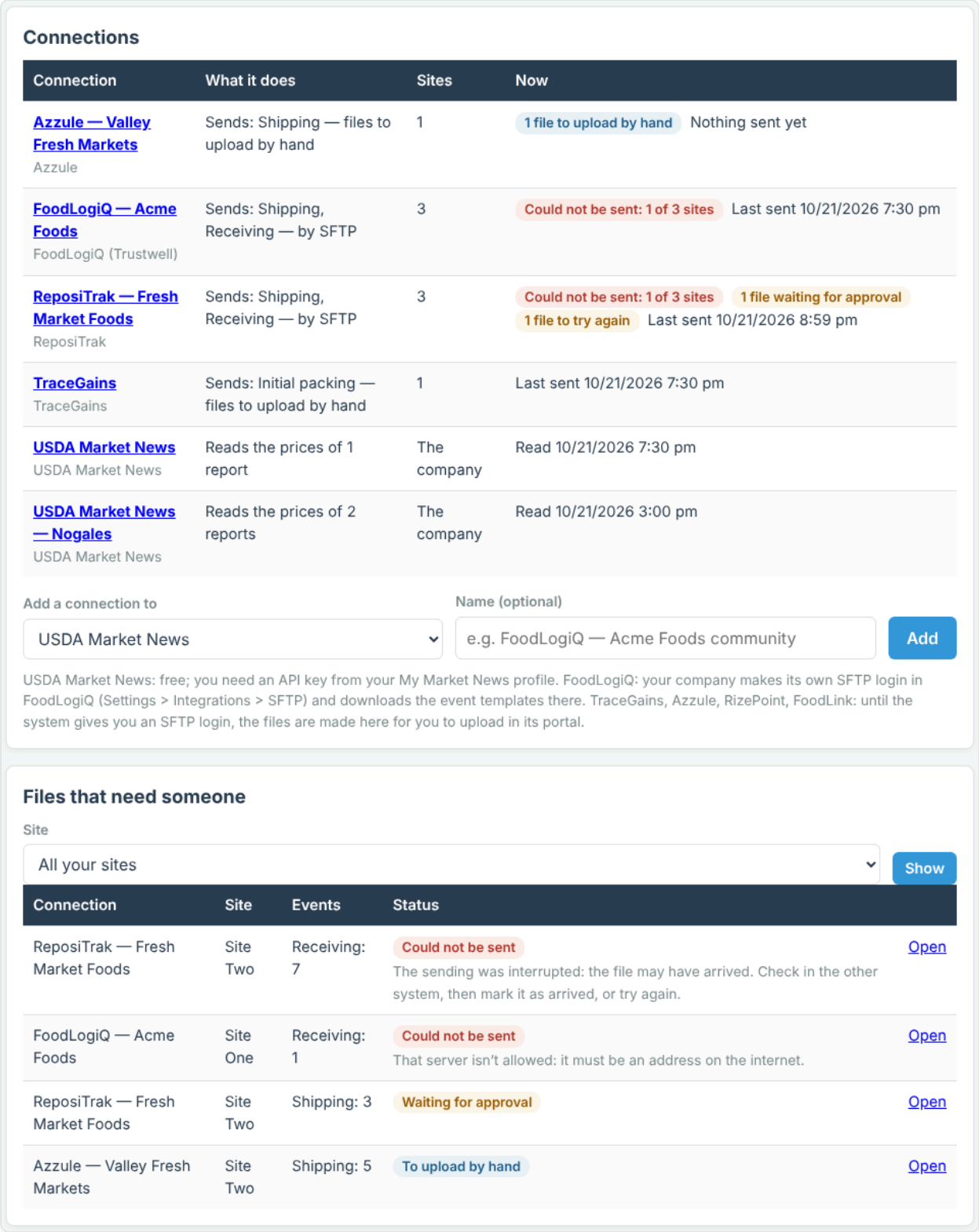
> **Note:** Each company signs up with each system itself, gets its own login (or API key) from it and enters it here: Continuum support never signs up for a system or enters a login for you. Users and growers don't have this page.

THE SYSTEMS

System	How it works
USDA Market News	Reads the prices of the reports chosen, every day, with the company's free API key (see Market News Prices).

System	How it works
FoodLogiQ (Trustwell)	By SFTP. Your company makes its SFTP login in FoodLogiQ (Settings > Integrations > SFTP) and downloads the event templates there. The server sftp.foodlogiq.com, port 22, the folder /events and dates as MM/DD/YYYY are filled in.
ReposiTrak	By SFTP, to ReposiTrak's server b2bprod.repositrak.com, port 22 (filled in). ReposiTrak gives your company a user name, a password and a folder: type all three (the folder must be typed: none is assumed), and save the server's key once you have checked it with ReposiTrak. Shipping's columns are filled in too: the FDA spreadsheet's Shipping tab, as Continuum PTI sends them, with dates as MM/DD/YYYY and files named like SiteTwo_ShippingKDE_20261022_183005_57.csv. The Receiving tab's columns are ready to turn on if a buyer asks for them.
TraceGains, Azzule, RizePoint, FoodLink	Files to download here and upload by hand in the system's portal, until the system gives you an SFTP login. The company's certificates and reports go to TraceGains from Buyer Compliance, through its API (see 6.64).
Another system	Any other, such as a buyer's own server: by hand to start with, or by SFTP.

Connections lists each one with What it does, how many of your Sites it covers and how it is doing Now: files waiting for approval, to upload by hand or to try again, Could not be sent: 1 of 3 sites, and when a file was last sent (Market News: last read). Below, Files that need someone lists the files waiting for approval, that could not be sent or to upload by hand, of the connections that are on, for all your sites or the Site chosen; Open opens the file.



Connections

Connection	What it does	Sites	Now
Azzule — Valley Fresh Markets Azzule	Sends: Shipping — files to upload by hand	1	1 file to upload by hand Nothing sent yet
FoodLogiQ — Acme Foods FoodLogiQ (Trustwell)	Sends: Shipping, Receiving — by SFTP	3	Could not be sent: 1 of 3 sites Last sent 10/21/2026 7:30 pm
ReposiTrak — Fresh Market Foods ReposiTrak	Sends: Shipping, Receiving — by SFTP	3	Could not be sent: 1 of 3 sites 1 file waiting for approval 1 file to try again Last sent 10/21/2026 8:59 pm
TraceGains TraceGains	Sends: Initial packing — files to upload by hand	1	Last sent 10/21/2026 7:30 pm
USDA Market News USDA Market News	Reads the prices of 1 report	The company	Read 10/21/2026 7:30 pm
USDA Market News — Nogales USDA Market News	Reads the prices of 2 reports	The company	Read 10/21/2026 3:00 pm

Add a connection to: USDA Market News

Name (optional): e.g. FoodLogiQ — Acme Foods community

Add

USDA Market News: free; you need an API key from your My Market News profile. FoodLogiQ: your company makes its own SFTP login in FoodLogiQ (Settings > Integrations > SFTP) and downloads the event templates there. TraceGains, Azzule, RizePoint, FoodLink: until the system gives you an SFTP login, the files are made here for you to upload in its portal.

Files that need someone

Site: All your sites

Show

Connection	Site	Events	Status	
ReposiTrak — Fresh Market Foods	Site Two	Receiving: 7	Could not be sent The sending was interrupted: the file may have arrived. Check in the other system, then mark it as arrived, or try again.	Open
FoodLogiQ — Acme Foods	Site One	Receiving: 1	Could not be sent That server isn't allowed: it must be an address on the internet.	Open
ReposiTrak — Fresh Market Foods	Site Two	Shipping: 3	Waiting for approval	Open
Azzule — Valley Fresh Markets	Site Two	Shipping: 5	To upload by hand	Open

The connections, and the files that need someone

Select a connection's name to open it: How it is doing, Files and Changed after sending (Market News: How it is doing and Prices) and, for system administrators,

Settings, Columns and, by SFTP, Sites' own logins.

ADDING A CONNECTION

1. Under Add a connection to, choose the system, type a Name if you want and select Add. Its Settings open.
2. Under Sites, choose Every site with QA on, A site group: and the group (see 6.56), or These sites: and tick them.
3. Under How the files go, choose By SFTP, with your company's login and type the login (below), or Download them here and upload them in its portal by hand.
4. Under The files, check Send events from (earlier events aren't sent), Dates written as (as the other system asks), the File name, and Start each file with the UTF-8 mark (ticked for ReposiTrak; it makes Excel show accents such as ñ right).
5. Under When, choose when the files are made (see When the Files Are Made), and select Save, or Save and test the connection.
6. Choose the columns of each kind of event to send (see below): until then nothing is made.

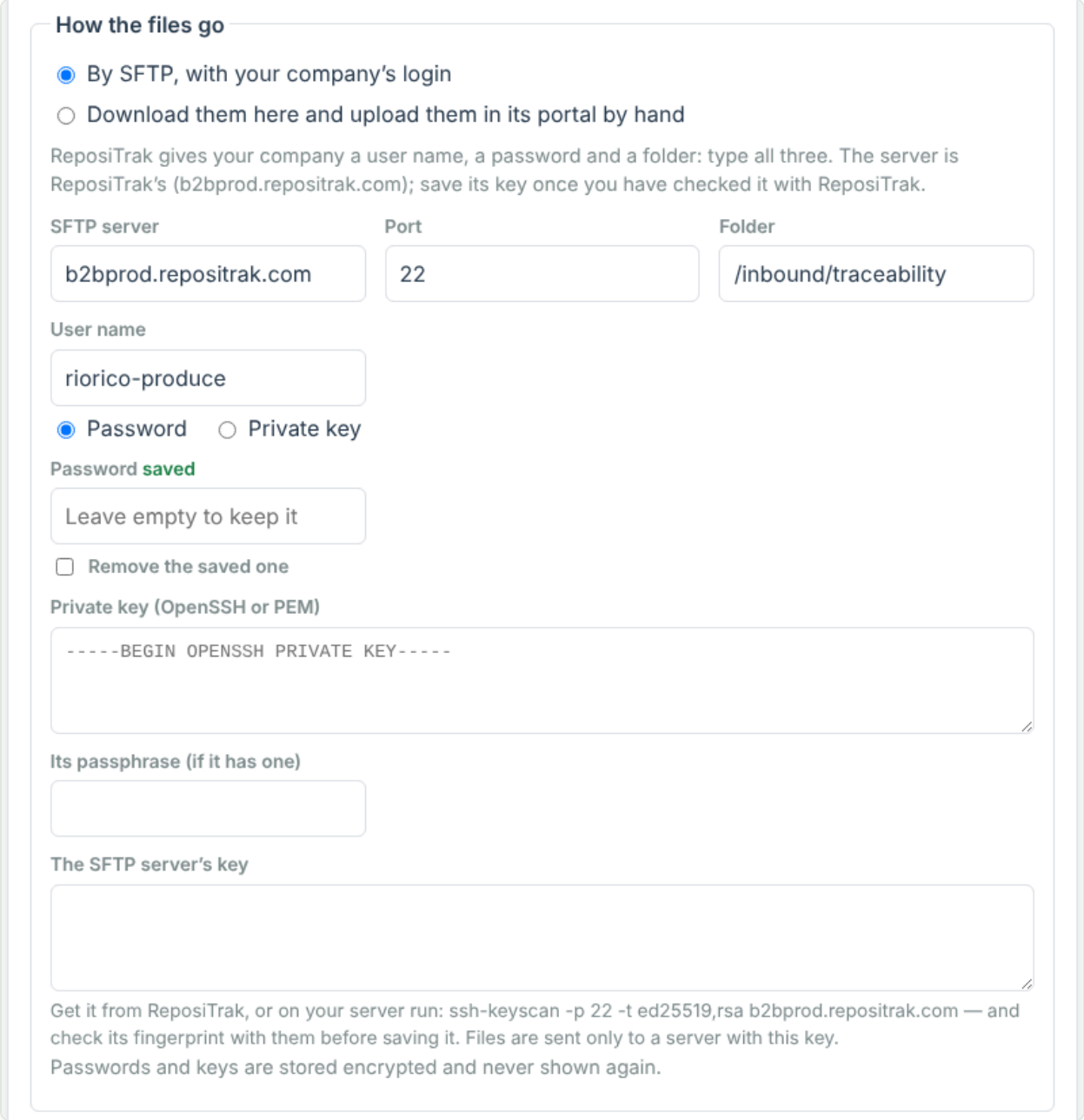
A new connection is On, covers every site with QA on, sends the events from the day it was added, makes its files every day at 6:00 pm and makes them wait for approval. A site whose QA is off sends nothing. A connection isn't deleted: untick On and select Save to stop it (its files to send wait: The connection is off.).

THE LOGIN AND THE SFTP SERVER'S KEY

By SFTP, type the SFTP server, the Port (usually 22), the Folder (it starts with /) and the User name the system gave your company; choose Password and type it, or Private key and paste it (OpenSSH or PEM, from -----BEGIN to -----END) with Its passphrase (if it has one). Passwords and keys are stored encrypted and never shown again: the field then says saved; leave it empty to keep it, type a new one to replace it, or tick Remove the saved one.

The SFTP server's key tells Continuum it is talking to the system's real server, not to one pretending to be it: files are sent only to a server with this key, so your records can't go to the wrong place. Ask the system for it, or have your IT person

run the ssh-keyscan command shown under the field; paste the line it gives (sftp.example-buyer.test ssh-ed25519 AAAAC3Nz…) and check its fingerprint with the system before saving it. Without it nothing is sent.



A ReposiTrak connection's SFTP login, its server's key still to be saved

> **Note:** If a file stops with The SFTP server's key doesn't match the one saved, don't paste a new key until the system confirms that its key changed: another key can mean the files would go to the wrong server.

Save and test the connection signs in and looks at the folder without writing anything: Connected: signed in, and the folder is there (3 items in it). Nothing was written., or The test failed: and why (the server's name wasn't found, the login refused, the folder not there...). A server on a private network is refused (That server isn't allowed: it must be an address on the internet.).

A site with its own login in the system sends with it: on Sites' own logins, choose the Site, type its User name, its Folder (if not the connection's) and its Password (or Or private key), and select Save the site's login. The server, the port, the server's key and the choice of password or private key stay the connection's. In the list of sites with their own login, Test (beside Use the connection's, which takes the site's login off) tests with that site's login, without writing anything: Site Two's own login: Connected: signed in, and the folder is there (3 items in it). Nothing was written., or Site Two's own login: The test failed: and why. Save and test the connection tests the connection's own login.

> **Note:** If the page says Keys and passwords can't be saved yet, ask Continuum support: the company's encryption key is set up on the server once.

THE COLUMNS OF THE OTHER SYSTEM'S TEMPLATE

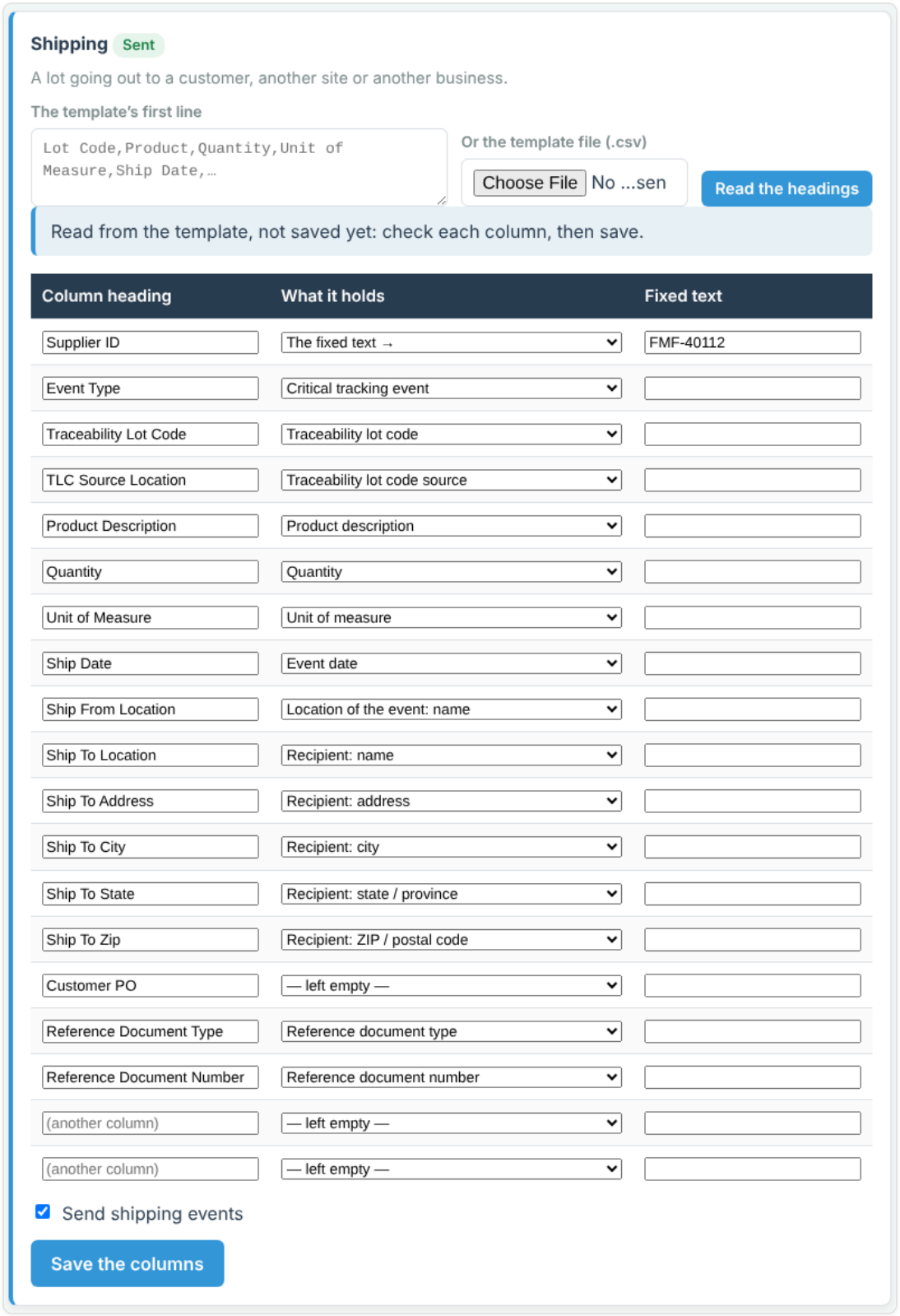
Each system wants its own columns. For each kind of event to send, download its template in the other system, then on Columns:

1. Under the kind of event, paste the template's first line (its headings) into The template's first line, or choose the file under Or the template file (.csv), and select Read the headings.
2. Check What it holds for each Column heading (each is matched to the data it most likely means) and change it where it is wrong: another field, — left empty

—, or The fixed text → with the text under Fixed text (the same in every row, such as your supplier number).

3. Tick Send shipping events (or the kind’s) and select Save the columns.

A ReposiTrak connection starts with its columns: Shipping has the 36 columns of the FDA spreadsheet’s Shipping tab and is Sent; Receiving has the Receiving tab’s and is Not sent until you tick Send receiving events. Brand, packaging and the second reference document are left empty: an event has one product description and one reference document. For another system that asks for the FDA spreadsheet’s columns, paste its headings as the template’s first line: they are matched the same way.



The columns read from a template, two changed by hand

The file has exactly those columns, in that order, then a line per event (a transformation: a line per lot used). Type a heading in an empty row to add a

column, or clear one to take it off; two columns can't have the same heading. Once saved, How the latest events would look shows the latest events of that kind in those columns.

WHEN THE FILES ARE MADE

Under When, the files are made Every day at... an hour, Every hour, or Only when someone asks. The hours are in the server's time zone, shown there, whatever yours is; since the work is done every 15 minutes on the server, a file is made within 15 minutes after its hour. An event goes in a file 10 minutes after it is recorded (time to fix a typo), once per connection. While a file waits for approval it is made again with the new events; while one is on its way, new events wait for the next file.

How it is doing lists your sites the connection covers, 25 at a time, with their Events not in a file yet, their Files and when a file was Last sent. To make files now, tick the sites and select Make their files now.

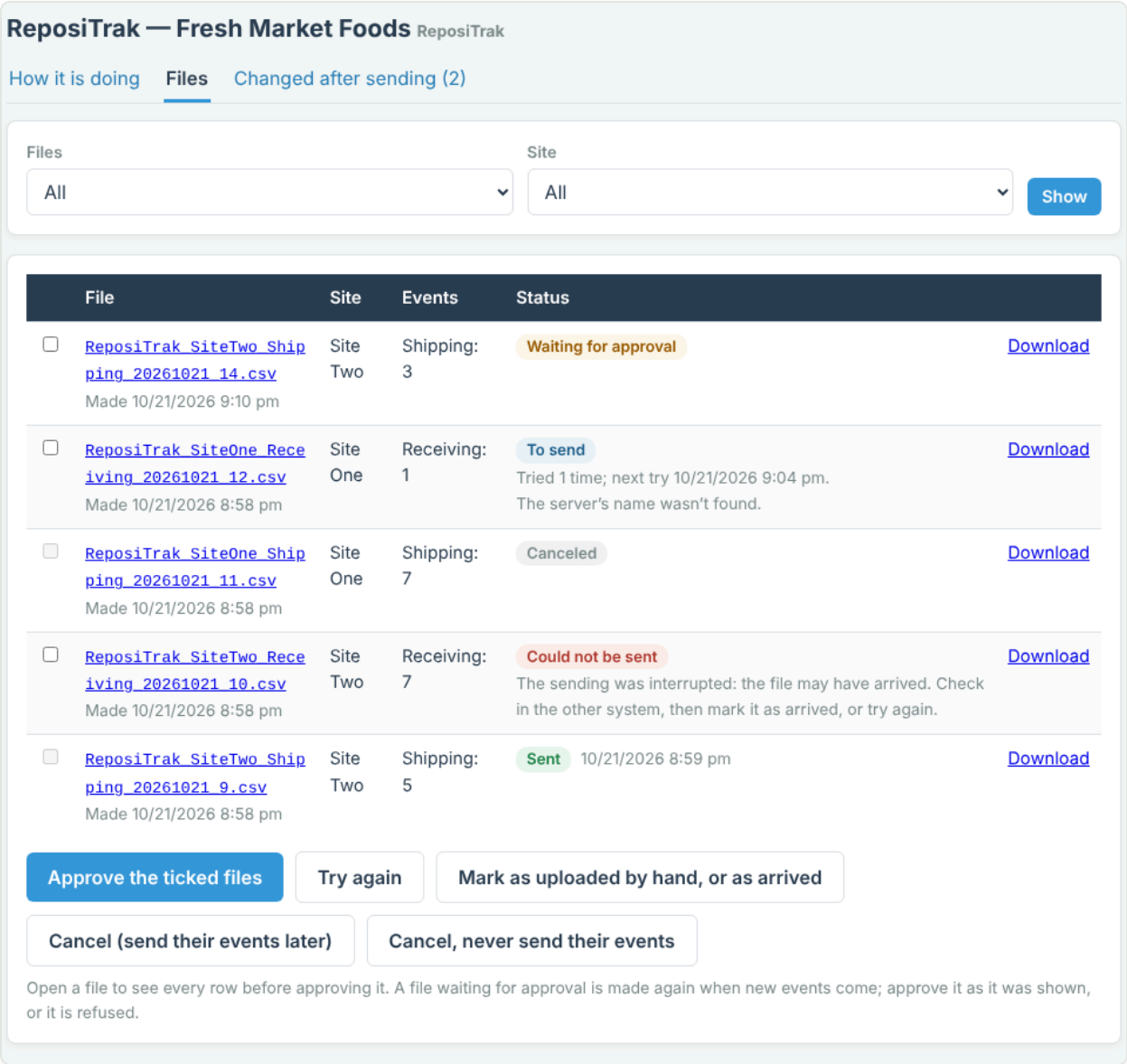
> **Note:** A system administrator can untick Files wait for approval on Settings once the files have been right for a while: they are then sent by themselves (or are ready to upload by hand) within 15 minutes, without anyone seeing them first.

APPROVING AND SENDING THE FILES

Files lists the connection's files of your sites, those Not sent yet to start with (choose another status, All or a Site, and select Show), each with its status:

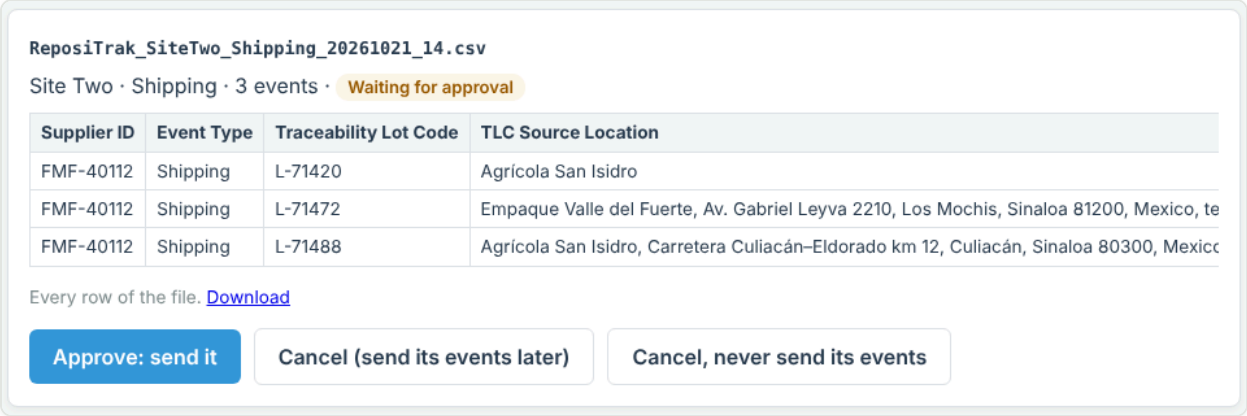
Status	What it means
Waiting for approval	Made; a Quality Control Manager of the site or a system administrator is to see it and approve it.
To send	Sent within 15 minutes, or at once with Send now. After a failed try: Tried 1 time; next try, and why.
Being sent	Being sent now.

Status	What it means
Sent	Sent (or uploaded by hand), with when.
Could not be sent	Every try failed, a problem a new try can't fix stopped it, or its sending was interrupted (see below).
Canceled	Canceled before it was sent.
To upload by hand	Approved, to download and upload in the system's portal.



A connection's files in five statuses

1. Select the file's name: its page shows every row (the first 50 of a larger file; Download shows all).
2. Check the rows and select Approve: send it (or Approve: ready to upload). Several files can be ticked on Files and approved with Approve the ticked files.



A file waiting for approval: its rows and the buttons

A file is approved only as it was shown: if it was made again with new events meanwhile, it isn't (1 file changed since it was shown (new events): look at it again.). Send now sends a file To send at once. Cancel (send its events later) cancels a file not sent yet, and its events go in the next file; Cancel, never send its events also keeps them from ever being sent by this connection.

For a file To upload by hand, select Download, upload it in the system's portal, then select I uploaded it to Azzule (with the system's name) on its page, or tick it on Files and select Mark as uploaded by hand, or as arrived: it is Sent. A file's contents are kept 120 days after it was sent or canceled.

On Today (see 6.60), system administrators and Quality Control Managers see, under Lots, Files for agencies waiting for approval, that could not be sent and to upload by hand, with how many there are at the site.

WHEN A FILE COULD NOT BE SENT

A failed send is tried again by itself at the job's first run (every 15 minutes) after 5, 15, 60, 240 and 720 minutes; after the sixth try the file is Could not be sent. A problem a new try can't fix stops it at once: the login or the server's key refused, the folder not there, nothing saved. Once the problem is fixed, select Try again on the file.

If a sending was interrupted (the server restarted while sending), the file may have arrived, so it isn't sent again by itself: it says The sending was interrupted: the file may have arrived. Look for it in the other system: if it is there, select It arrived in ReposiTrak: mark it as sent (with the system's name) on its page, or Mark as uploaded by hand, or as arrived on Files; if not, Try again.

EVENTS CHANGED AFTER THEY WERE SENT

An event voided or corrected on Traceability Events after its file was sent (or made ready to upload) is still in the other system as it was. Changed after sending lists them, with What happened (Voided, or Corrected: now and the new event's number) and why. Correct each one in the other system too, then tick it and select Mark the ticked events as corrected in ReposiTrak (the system's name). A correction is sent as a new event in the next file.

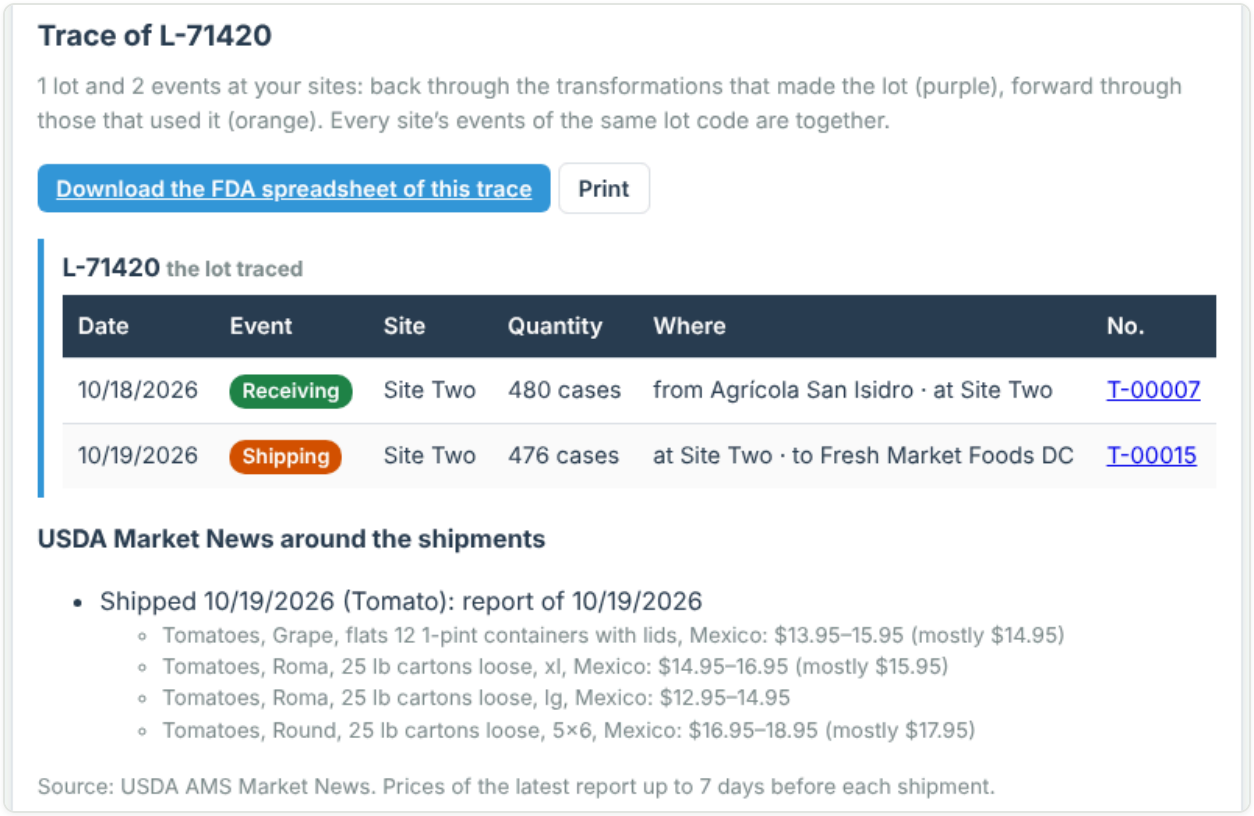
MARKET NEWS PRICES

The API key is free: sign up at mymarketnews.ams.usda.gov and copy it from your profile (Show API key). On the Market News connection's Settings, a system administrator types the API key, chooses when to Read the prices (every day at 3:00 pm to start with) and selects Save; then, under Reports read, finds a report by words of its title (Find reports, Find, then Add), or types its number (slug id, in the report's address on My Market News) and title and selects Save the list. Read now reads them at once.

Paste the key just as My Profile on My Market News shows it: spaces, line breaks and invisible characters copied with it are taken out, and any other letter, digit or sign is kept. A key is refused, and the message says why, when it has a colon, usually its label copied with it (The API key can't have a colon (:): copy just the key from My Profile on My Market News, without its label.), when it has an accented letter or another language's character, or when it is shorter than 8 or longer than 200 characters (That API key is too short or too long: copy all of the key, and only the key, from My Profile on My Market News.).

Prices lists the prices read, newest first: the Report day, the Commodity and variety, the Package, size, the Origin, market, the Price and Mostly, with filters. On Traceability Events, Trace a lot shows, for each shipment, up to four prices of the commodity's latest report up to 7 days before it, of any variety (not only the lot's),

for up to 8 shipping days a trace. A commodity is found by its English name, singular or plural; other names can be typed under Your commodities in Market News on Settings.



Market News prices next to a lot's shipment on its trace

Below the prices, Trends and comparisons (Market Prices) opens Market Prices for the commodity of the newest price listed: its trend, its lines side by side, and the company's shipments and claims beside the market (see 6.65).

6.64 Buyer Compliance

Traceability > Buyer Compliance keeps what the company's buyers ask of it each year in their systems (FoodLogiQ (Trustwell), TraceGains, RizePoint / FranConnect, FoodLink, ReposiTrak or another system): each buyer's yearly questionnaire, and the audit information of the company's sites, that is, their current certificates and latest audits kept in External Audits (see 6.30). It also keeps the certificates of the facilities the company sells from, its own sites and its growers, as USDA Organic INTEGRITY and Azzule give them, and uploads the

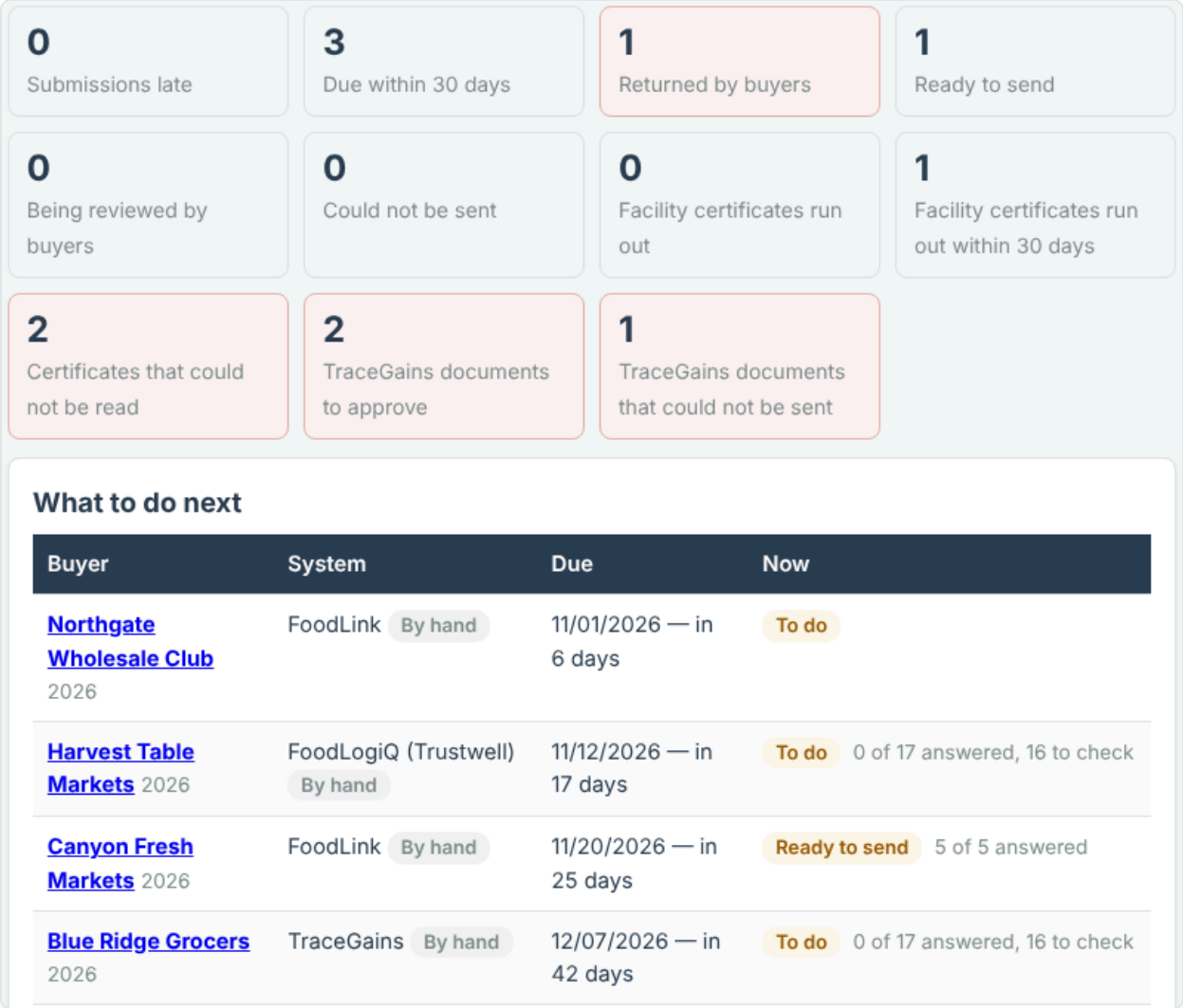
company’s certificates, audit reports and test reports to TraceGains for the buyers that use it. A question is answered once: the answer comes back, to check, the next year and for every buyer that asks the same question. It is in the Traceability menu, after Agency Connections (see 6.63).

Who	What they do
System administrators	Add the buyers and the systems each one uses, and the facilities whose certificates are read; change the company’s answers on Answers; set how each system works, the USDA Organic INTEGRITY API key and when the submissions open (Systems); keep the TraceGains connection, link its locations and choose what is sent (TraceGains); and everything Quality Control Managers do, for every submission and site.
Quality Control Managers	See the submissions that cover any of their sites. Answer, send and mark the submissions that cover only their sites, and open them early. See their sites’ facilities, read a certificate now and add one by hand. See the TraceGains locations linked to their sites, and approve, send or hold their sites’ TraceGains documents. See the company’s answers.
Users and growers	Don’t have this page.

Note: The buyers' questionnaires work by hand in every system, since none of the buyers' systems takes them through its API yet: the page keeps the dates, the answers and the audit information to copy into the system's portal, and you mark what you submitted and what the buyer said. USDA Organic INTEGRITY is read through its public API once a system administrator saves the company's key and chooses Live (see USDA Organic INTEGRITY's API, below); Azzule's certificates are downloaded and added by hand. TraceGains takes the company's documents through its Gather API (see TraceGains Documents, below). When another system's API is connected (done by Continuum support), that system works through it, and nothing else on the page changes.

THE OVERVIEW

The page has seven tabs: Overview, Submissions, Buyers, Answers, Facilities, TraceGains and, for system administrators, Systems. Overview, where the page opens, counts the submissions late, due within 30 days, returned by buyers, ready to send, being reviewed by buyers and that could not be sent; the facility certificates that have run out, that run out within 30 days and that could not be read; and, once a TraceGains token is saved, the TraceGains documents to approve and that could not be sent. Each count opens the list. What to do next lists the submissions still open or with the buyer: the Buyer and the year, the System and how it works (By hand, for now), the date it is Due (in 9 days, 3 days late) and where it stands Now, with how many questions are answered and how many are to check.



The overview: the counts and what to do next

Submissions lists every submission you may see, by the date it is due, with the Year and Show filters (Open and being reviewed to start with, All, or one status). Select a buyer's name to open its submission.

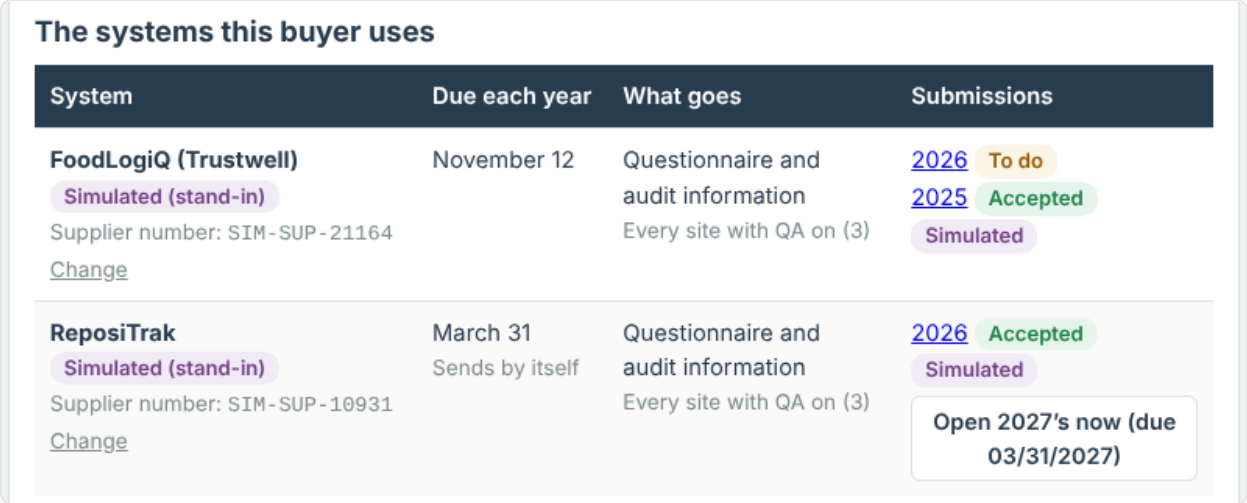
> **Tip:** Today (see 6.60) shows the same things under Buyers and certificates: the submissions due within 30 days or late, returned or that could not be sent, for those who answer them; the site's facility certificates that have run out, that run out within 30 days or that could not be read; and its TraceGains documents to approve and that could not be sent.

ADDING BUYERS AND THE SYSTEMS THEY USE

System administrators add each buyer once, then each system it uses:

1. On Buyers, under Add a buyer, type the Name and, if you want, the Customer number in your system, the Contact for quality and a Note. Select Add.
2. The buyer's page opens: Buyer added. Now add the systems this buyer uses. Under Add a system this buyer uses, choose the System.
3. Type Your supplier number in it and The buyer's program (such as Supplier Approval), if you want, and choose the month and day under Due each year on.
4. Under What goes, tick The buyer's yearly questionnaire, the audit information, or both. For the audit information, choose its sites: Every site with QA on, A site group (and choose the Site group, see 6.56), or Chosen sites (and tick them).
5. Tick Send by itself once everything is answered and checked if the submission should go as soon as it is ready. It works only for a system connected through its API (see How Each System Works); until then the buyer's page says Sends by itself once its system works through its API; by hand until then.
6. Select Add the system: System added. Its submission opens on its own before it is due, or open it now.

A buyer can use more than one system, each one once. Instead of typing the buyers, Take buyers from Customer Specifications lists the customers of Customer Specifications (see 6.24) that aren't buyers yet: tick them and select Add the ticked customers as buyers. Two buyers can't have the same name (That is there already.). What isn't filled in is refused with its message, such as Tick what goes: the questionnaire, the audit information or both., Choose the site group. or Tick the sites. A due day that the month doesn't have is its last day (31 in April is April 30).



A buyer and the two systems it uses

The buyer's page lists its systems with their submissions, newest first. Change on a system changes everything but the system; untick On (its submission opens each year) to stop it. A buyer you no longer sell to keeps its records: untick A buyer now (its submissions open each year) and select Save; Buyers shows it as Not a buyer now.

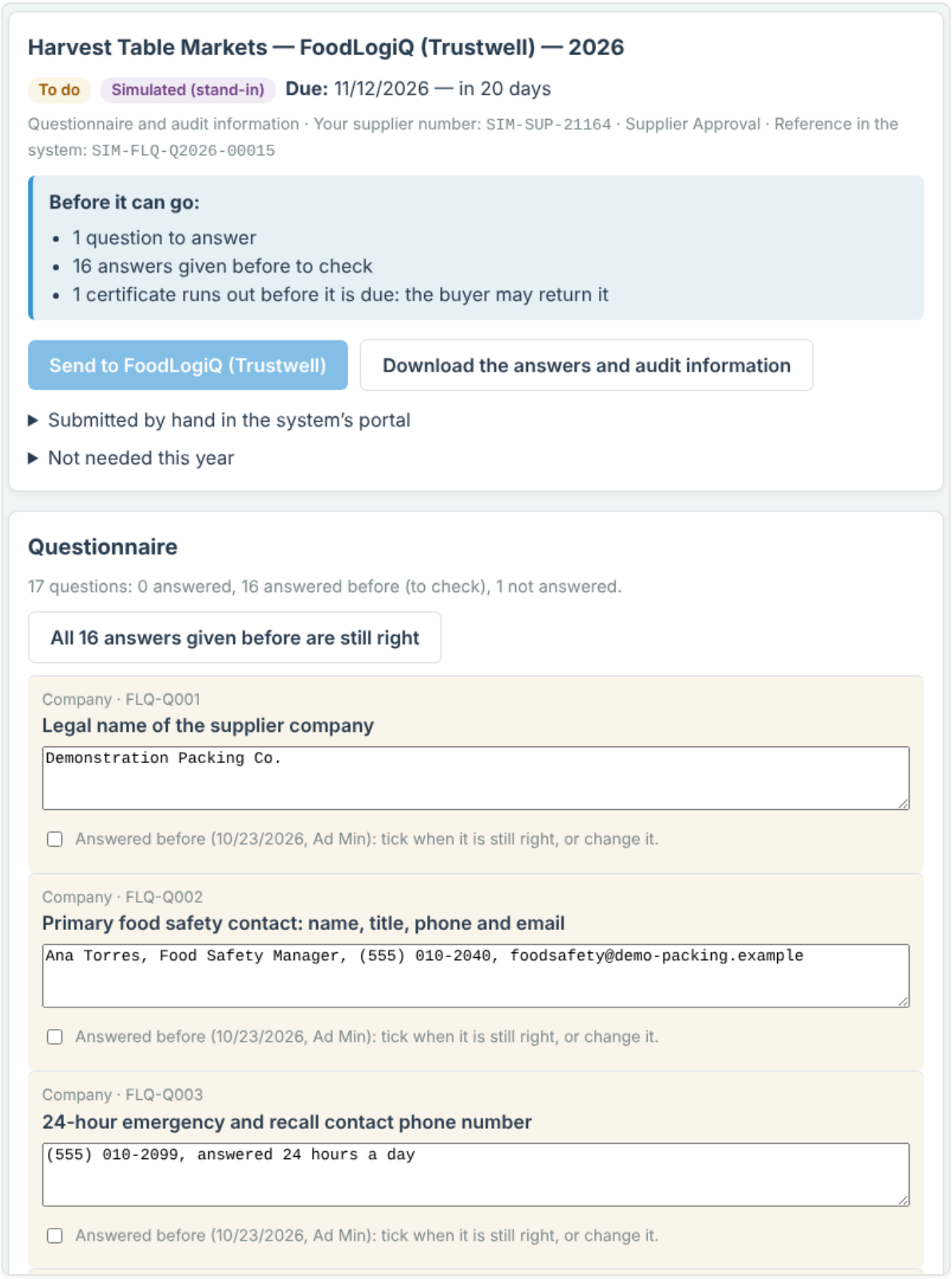
WHEN A YEAR'S SUBMISSION OPENS

Each system a buyer uses has one submission a year. Once a day, on the server, each submission opens 60 days before it is due (a system administrator can choose 7 to 180 days on Systems). A system that works by hand gets the questions of its last submission that had them, each with the company's answer, to check; its first year, you type the questions in (see Answering the Questionnaire). To open one sooner, select Open 2027's now (due 03/31/2027) on the buyer's page. A system that is off opens nothing (That buyer's system is off: turn it on first.), nor does a buyer that is no longer one: its page offers no Open now (That buyer is no longer one: turn the buyer on first.).

ANSWERING THE QUESTIONNAIRE

A submission's page starts with its status, how its system works, the date it is due, what goes, your supplier number, the buyer's program and the system's reference. Before it can go lists what still stops it: questions to answer, answers given before to check, no audit information chosen, or a chosen program with no certificate or audit in External Audits. A certificate that runs out before the due date is listed too:

it doesn't stop the submission, but the buyer may return it. Once nothing stops it, what is left is listed under Note.



A submission with the answers given before, to check

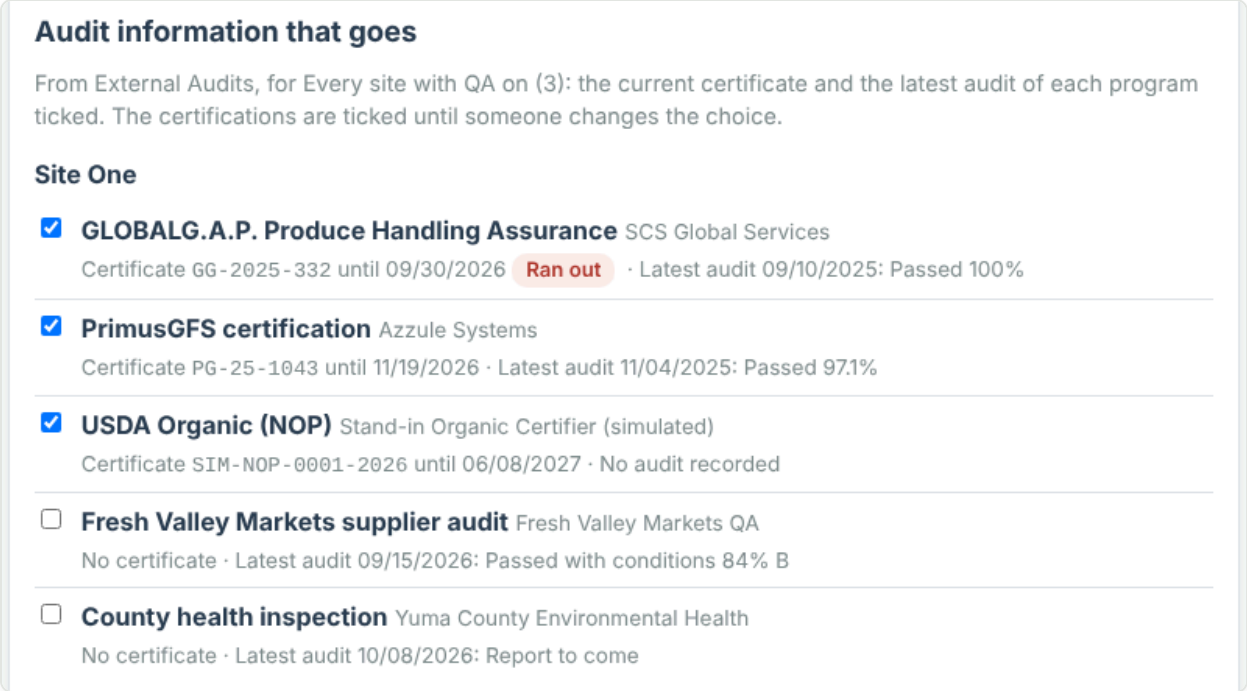
1. Open the submission from Overview or Submissions.
2. Read each answer given before (on a pale yellow background). If it is still right, tick the box under it; if not, change it. All 16 answers given before are still right marks them all at once.
3. Answer the new questions: Yes or No, a date, a number, one of the choices, or a text. A question marked (optional) can stay empty.
4. Select Save answers.

Each answer is checked by its kind: Answer Yes or No., Type a date (mm/dd/yyyy)., Type a number., Choose one of the answers., or An answer can be at most 4000 characters. The page says how many couldn't be saved (2 answers could not be saved: see below.) and keeps what you typed. A number can have a % sign or a decimal comma (99,5). Each answer saved becomes the company's answer to that question (see The Company's Answers) and goes, to check, to the same question still unanswered in the other open submissions. Questions are the same when their words are, whatever the capitals, accents or punctuation.

For a system that works by hand, the questions are copied from its portal: open Type in the buyer's questions, paste them one a line ("Section: question" keeps the section) and select Add the questions. A question beginning with Do, Does, Is, Are, Has, Have, Can or Will is answered Yes or No, one with the word date is a date, and the rest are text. A question the company answered before, for any buyer, comes with its answer, to check. Up to 200 questions go in a submission; Take a question out removes one typed by mistake.

THE AUDIT INFORMATION THAT GOES

Audit information that goes lists, site by site, the programs in use in External Audits (see 6.30) at the sites the buyer's system covers, each with its current certificate (number and end date) and its latest recorded audit (date, outcome, score or grade). The certifications are ticked to start with; customer audits and the other programs aren't. A certificate already expired is marked Ran out, and one that expires before the due date Runs out before it is due. Tick what goes and select Save the choice. The information is read again from External Audits each time the submission is opened and when it is sent, so a renewed certificate added there goes with it.

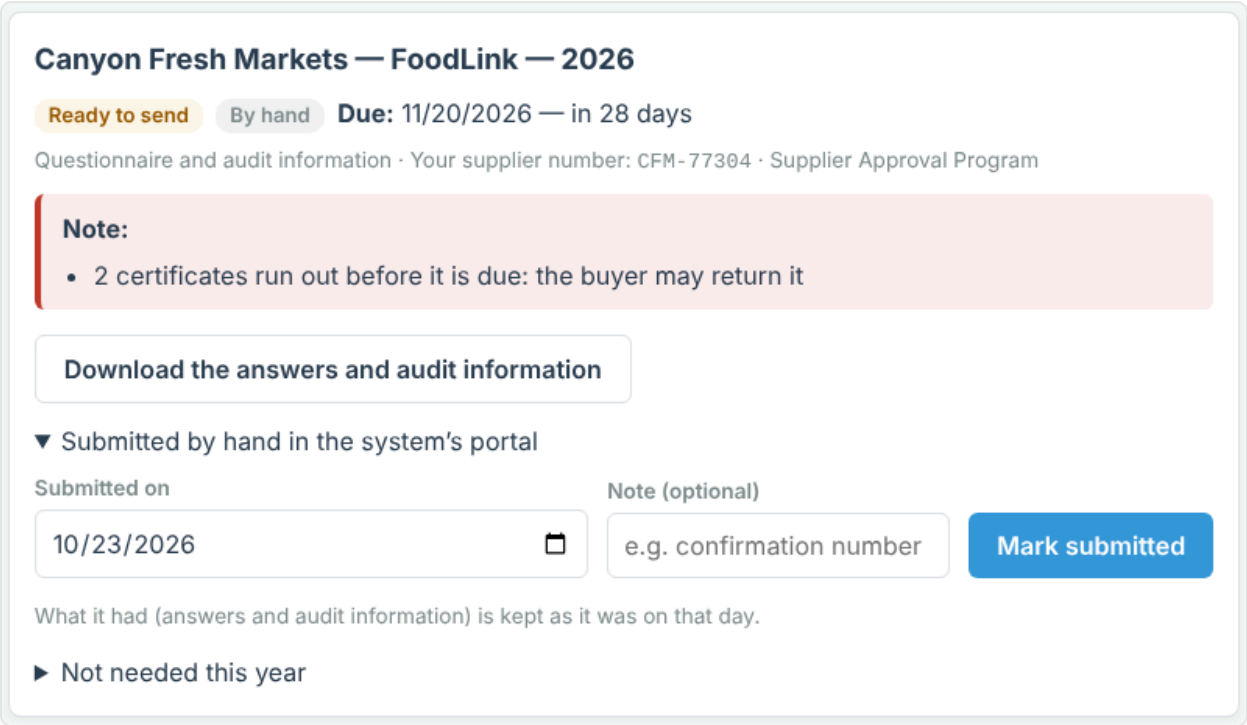


The audit information of a site: the certifications ticked

SUBMITTING BY HAND

Once nothing stops it, the submission is Ready to send. For a system that works by hand:

1. Select Download the answers and audit information. The file is a page with the questionnaire (each question with its answer) and the audit information (site, program, certificate and latest audit) to copy from. The certificates and audit reports themselves are in External Audits.
2. Enter the answers and the audit information in the system’s portal, and submit them there.
3. Back on the submission, under Submitted by hand in the system’s portal, check the date it was Submitted on and type a Note if you want, such as the confirmation number.
4. Select Mark submitted: Marked as submitted by hand.



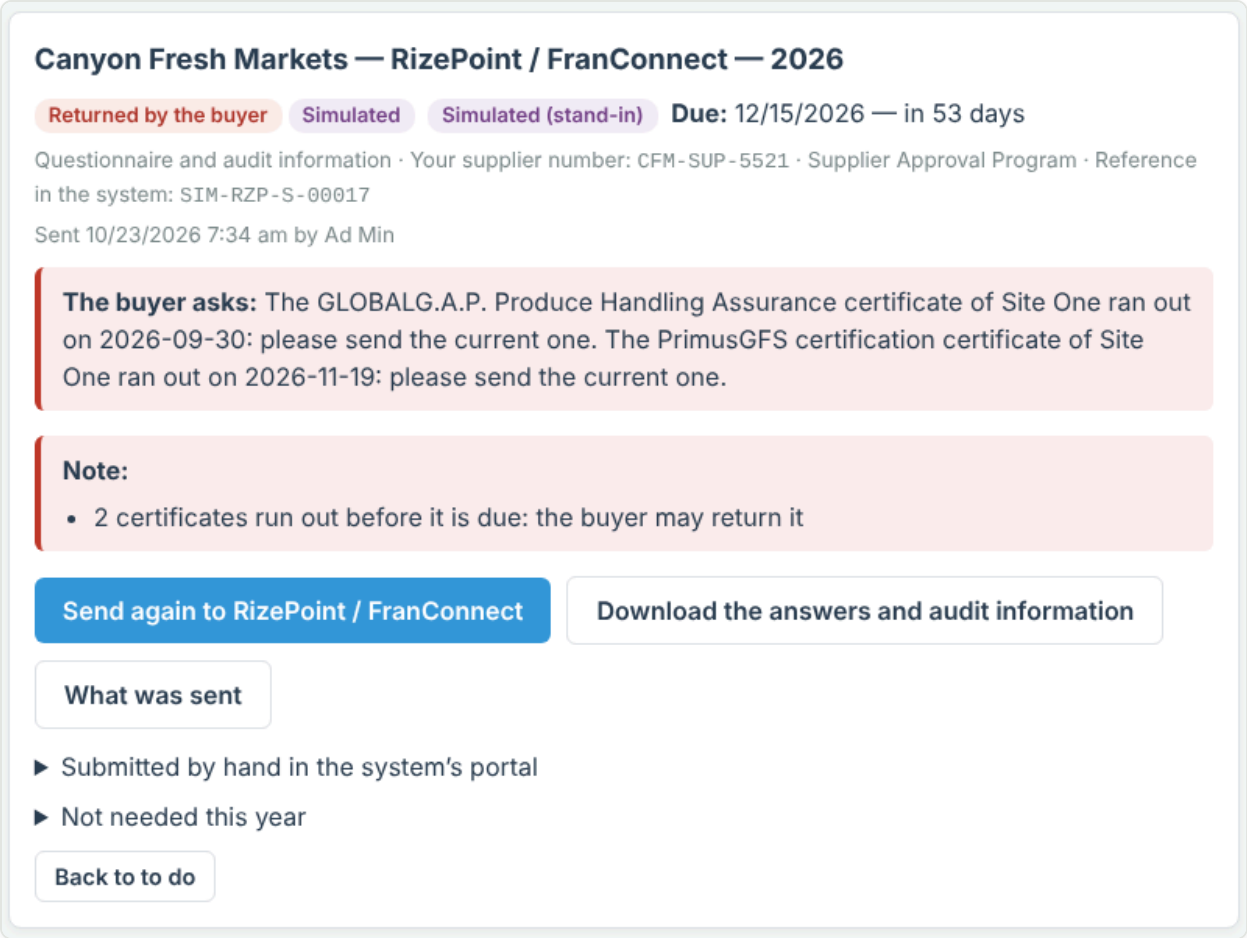
A submission by hand, ready to mark as submitted

What the submission had that day, the answers and the audit information, is kept as it was: What was sent downloads it. Marking it submitted needs every question answered and the answers given before checked (Answer every question and check the answers given before first: what was submitted is kept as it was.), and a date that isn't in the future (Type the date it was submitted (not in the future).). The download can be made at any time: a question still unanswered is marked NOT ANSWERED, and an answer given before and not checked, Answered before, NOT CHECKED this year.

For a system connected through its API, Send to FoodLogiQ (Trustwell) (the system's name) sends the submission instead, once nothing stops it: Sent. The buyer reviews it; its answer shows here. It is then Sent: the buyer is reviewing it. Every 15 minutes, on the server, the system is asked for the buyer's answer; Ask FoodLogiQ (Trustwell) now asks at once (The buyer is still reviewing it.). A send that fails says why (It was not sent: ...) and is Could not be sent. One that sends by itself is tried again after 15, 60, 240, 720 and 1440 minutes, then waits for someone. A send interrupted half way may have arrived, so it is never sent again by itself: Sending was interrupted, so it may have arrived: check in the system, then mark what happened or send it again.

WHAT THE BUYER SAYS

For a submission made by hand, mark what the buyer said in its portal: The buyer accepted it, or open The buyer returned it, type What the buyer asks for and select Mark returned. Through a system's API, the answer comes by itself: Accepted, or Returned by the buyer, with The buyer asks: and the buyer's words.



A submission the buyer returned, and what it asks for

For a returned submission, change what the buyer asks for (an answer, or a renewed certificate in External Audits), then submit it again in the portal and mark it submitted, or select Send again to RizePoint / FranConnect (the system's name). Back to to do puts a submission that was returned, submitted by hand, not needed or could not be sent back to To do. When the buyer asks nothing this year, open Not needed this year, type Why and select Mark not needed. If a system changes how it works after a submission was sent through it, the page says The system was switched to another mode (or the stand-in to another simulation server) after

it was sent: mark what the buyer said by hand. History, below, lists what was done on the submission, when and by whom (the job, when it was done on the server).

THE COMPANY'S ANSWERS

Answers keeps the company's latest answer to each question any buyer asked, with how many buyers' systems ask it (Asked in 8 buyer systems) and when and by whom it was last answered. Find looks through the questions and answers. A system administrator changes an answer there and selects Save: the new answer goes, to check, to the open submissions that haven't checked theirs yet. A question with choices is answered with one of them, chosen in a list (Choose one of the answers.). Quality Control Managers see the answers without changing them.

FACILITIES AND THEIR CERTIFICATES

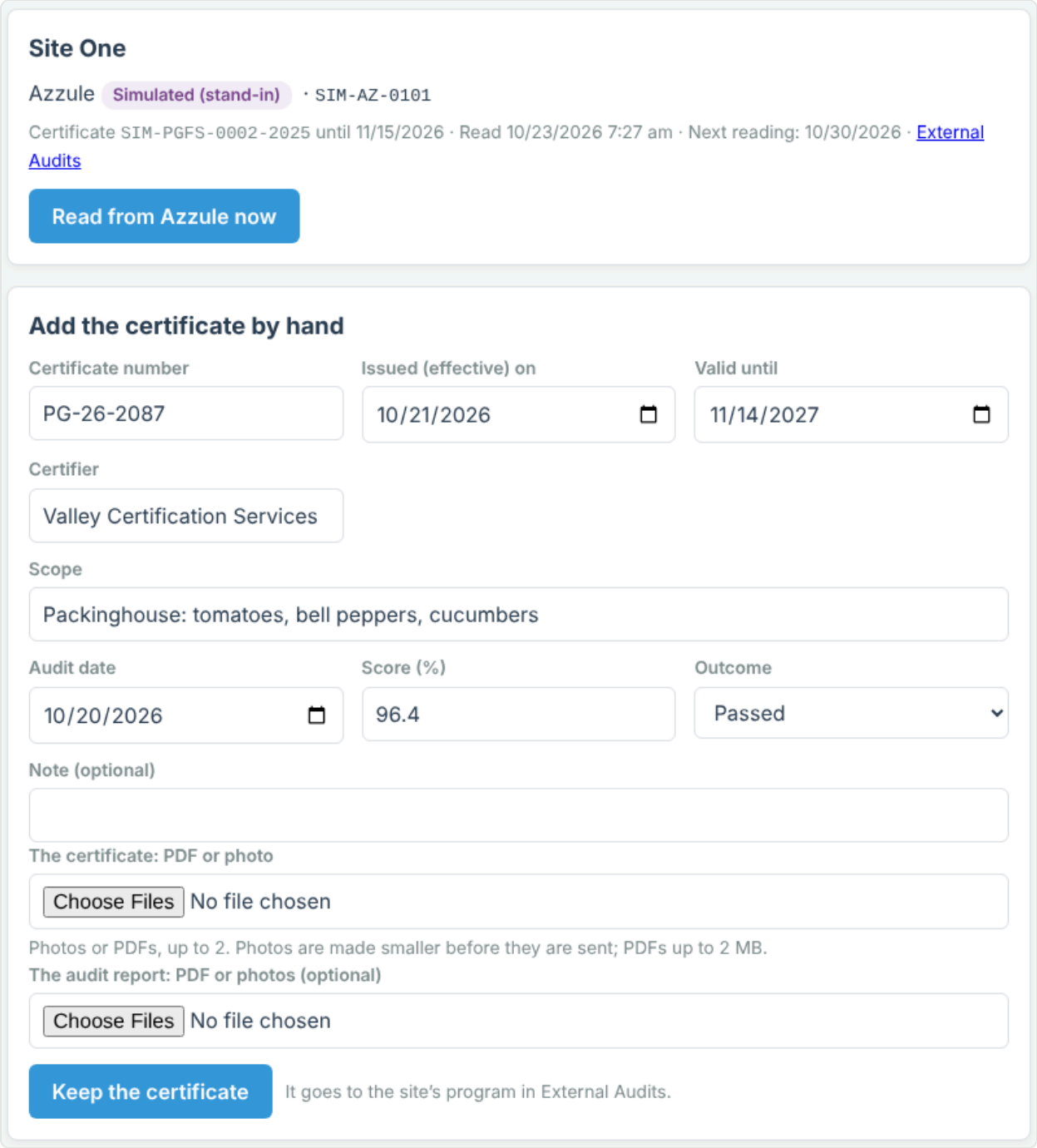
Facilities lists the company's sites and growers whose certificates are kept: from USDA Organic INTEGRITY, the organic certificate and its addenda; from Azzule, the PrimusGFS certificate and audit report. Each line shows the Facility with its number in the system, the System, the Certificate and its end date (Runs out soon within 30 days, Ran out after), and when it was Read and will be next. System and Show (Run out, Running out within 30 days, Could not be read) narrow the list. While USDA Organic INTEGRITY is Live, the tab shows USDA's notice: This product uses USDA's Organic Integrity Database API but is not endorsed or certified by USDA. Quality Control Managers see their sites' facilities.

A system administrator adds a facility under Add a facility: choose Read from (the system) and the Site; under Whose certificate, The site's own, or A grower's and the Grower (of the site's grower list); for a site, the External Audits program it goes to (or Found or made on the first reading); type Its number in the system (the Organic INTEGRITY operation ID, or the Azzule operation number) and the Name as the system shows it if you want; and select Add. Only active sites with QA on can be chosen, and each site, or grower of a site, is added once for each system. The message says what comes next: Facility added. Its certificate is read tonight, or read it now. for a system read through its API, or Facility added. Its system works by hand: download the certificate from its site and add it below.

Where a certificate goes: a site's, to its program in External Audits (see 6.30), the site's organic or PrimusGFS certification, or one made for it named USDA Organic (NOP) or PrimusGFS, with Azzule's audit and its score recorded as an audit of that program; a grower's, to Grower Certificates (see 6.15), as Organic or PrimusGFS, with the audit's date and score in the note. The same certificate (the same number and end date) isn't kept twice. An organic certificate has no end date: the anniversary date, when the operation updates its certification each year, is kept as its end.

For Azzule, and for USDA Organic INTEGRITY until it is Live, the certificate is downloaded from the system's site (the facility's page gives its address) and added by hand; any facility's certificate can be added by hand this way, such as a renewal you have before it is read. System administrators and the site's Quality Control Managers do it on the facility's page:

1. On Facilities, select the facility.
2. Under Add the certificate by hand, type the Certificate number, the date it was Issued (effective) on and the date it is Valid until (for organic, the Anniversary date (the yearly update)), and the Certifier and the Scope (for organic, the Certified products (from the addendum)) if you want.
3. For Azzule, type the Audit date and the Score (%) and choose the Outcome, to keep the audit too.
4. Choose the files: the certificate (with its addenda for organic) and, for Azzule, The audit report. A site's certificate takes up to 2 files and its audit up to 5; a grower's, 3 in all.
5. Select Keep the certificate: The certificate was kept. (or That certificate was kept already.).



A site's Azzule certificate, and a renewal being added by hand

What is missing is refused with its message: Type the certificate number., Type the date it was issued., Type the date it runs out (after it was issued)., Type the date of the audit (not in the future). or The score is a number from 0 to 100. Readings lists each certificate read or added, when, how (by hand, or the system) and by whom. For a system connected through its API (USDA Organic INTEGRITY, once it is Live), each certificate is read by the daily job on the server when it is

due: once a year and 30 days before it runs out, then every week until a new one comes, and the next day after a reading that failed. Read from USDA Organic INTEGRITY now (the system's name) reads it at once. Certificates that have run out or run out within 30 days, and those that could not be read three times running, are Trend Alerts at their site (see 6.13). System administrators change a facility's number, name and program under Settings, and untick Read its certificate to stop reading it.

TRACEGAINS DOCUMENTS

Buyers that use TraceGains see their suppliers' documents in TraceGains Gather, TraceGains' side for suppliers. With a Gather API token, the TraceGains tab uploads the company's documents there as they are renewed: a site's certificate and latest audit report (External Audits, 6.30), a grower's certificate (Grower Certificates, 6.15), a controlled document's version in effect (6.22), and the latest passing water and lab test reports (Water Testing, 6.49; Lab Results, 6.38). Each document waits for approval unless a system administrator lets them go by themselves. The buyers' questionnaires are still answered in TraceGains (Submissions keeps the answers to copy), and lots and traceability events go to TraceGains as files from Agency Connections (see 6.63).

The tab has the documents, your TraceGains locations and what the customers ask for and, for system administrators, what is sent for each document type and the connection. Quality Control Managers see the locations linked to their sites and their sites' documents; until a system administrator saves the token, the tab says An administrator connects TraceGains first.

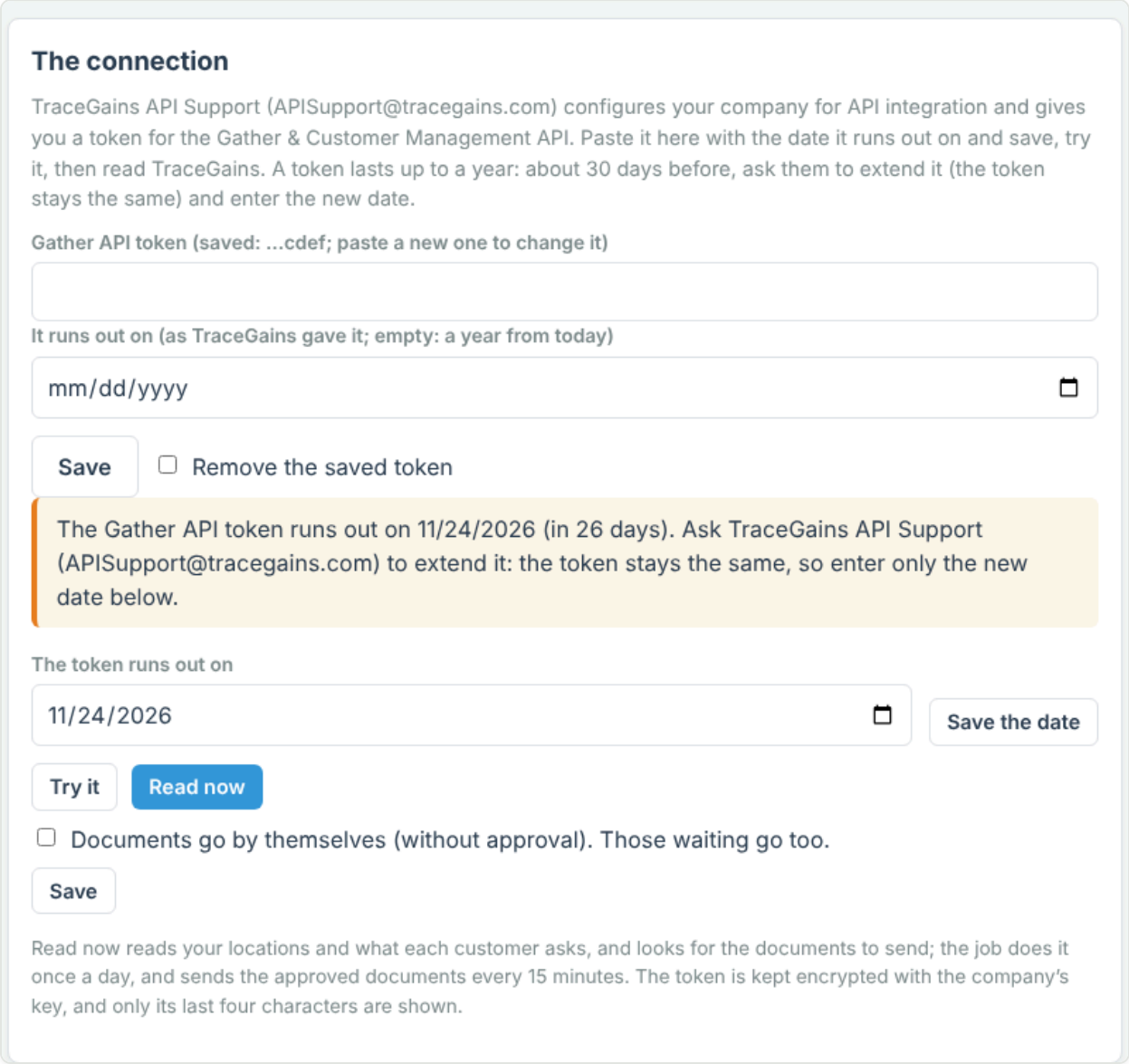
CONNECTING TRACEGAINS

TraceGains API Support (APISupport@tracegains.com) configures your company for API integration and gives it a token for the Gather & Customer Management API: the company asks for it, not Continuum support. Then a system administrator, under The connection at the bottom of the TraceGains tab:

1. Pastes the token in Gather API token, types the date TraceGains gave for when it runs out in It runs out on (left empty: a year from today) and selects Save: Saved. Try it, then read TraceGains. A Bearer in front, spaces and invisible characters pasted with it are taken off; what isn't a token is refused (That

doesn’t look like a token: paste the whole token TraceGains’ support gave you, and only the token.).

2. Selects Try it: TraceGains answered and took the token, with how many locations your company has there, or TraceGains could not be used: and why, such as TraceGains refused the token: check it with TraceGains API Support (APISupport@tracegains.com), who may need to extend it, or paste a new one.
3. Selects Read now: it reads your locations and what each customer asks of them, and looks for the documents to send (Read from TraceGains: 3 locations, 2 customers, 7 document requests. Documents found: 0.).
4. Links the locations and chooses what is sent for each document type (below), then selects Read now again.



The TraceGains connection, its token saved

The token is kept encrypted with the company's key and only its last four characters are shown; tick Remove the saved token and select Save to remove it. Once a day, on the server, the job reads TraceGains and looks for the documents, as Read now does, and every 15 minutes it sends the documents to send. The top of the tab says when TraceGains was last read, or The last reading of TraceGains failed: and why; a reading that failed is tried again two hours later. When the requests of some customers can't be read, their earlier ones are kept (The requests of some customers could not be read this time; their earlier ones are kept).

A Gather API token lasts up to a year. The connection says when it runs out (The Gather API token runs out on 11/24/2026 (in 26 days).): the date typed when the token was saved or, when none was typed (or the token was saved before 30 October 2026), a year after it was saved, with That date is assumed, a year after the token was saved: enter the one TraceGains gave you. About 30 days before, ask TraceGains API Support (APISupport@tracegains.com) to extend it. The token stays the same, so a system administrator types only the new date in The token runs out on and selects Save the date: Saved. The reminder starts 30 days before the token runs out. A date more than two years ahead, or more than a year back, is refused (That isn't a date the token can run out on...). The same token pasted again keeps its date; a new token gets the one typed with it.

From 30 days before, the note is amber, and red once the token has run out. The top of the TraceGains tab says it too (Quality Control Managers read An administrator asks TraceGains to extend it.), each site linked to a TraceGains location gets the Trend Alert TraceGains token runs out on ... (see 6.13), and system administrators see it on the Administration card of the home page and Today. Once it has run out, TraceGains refuses the token and nothing is sent; when the new date is saved, the job sends again at its next run.

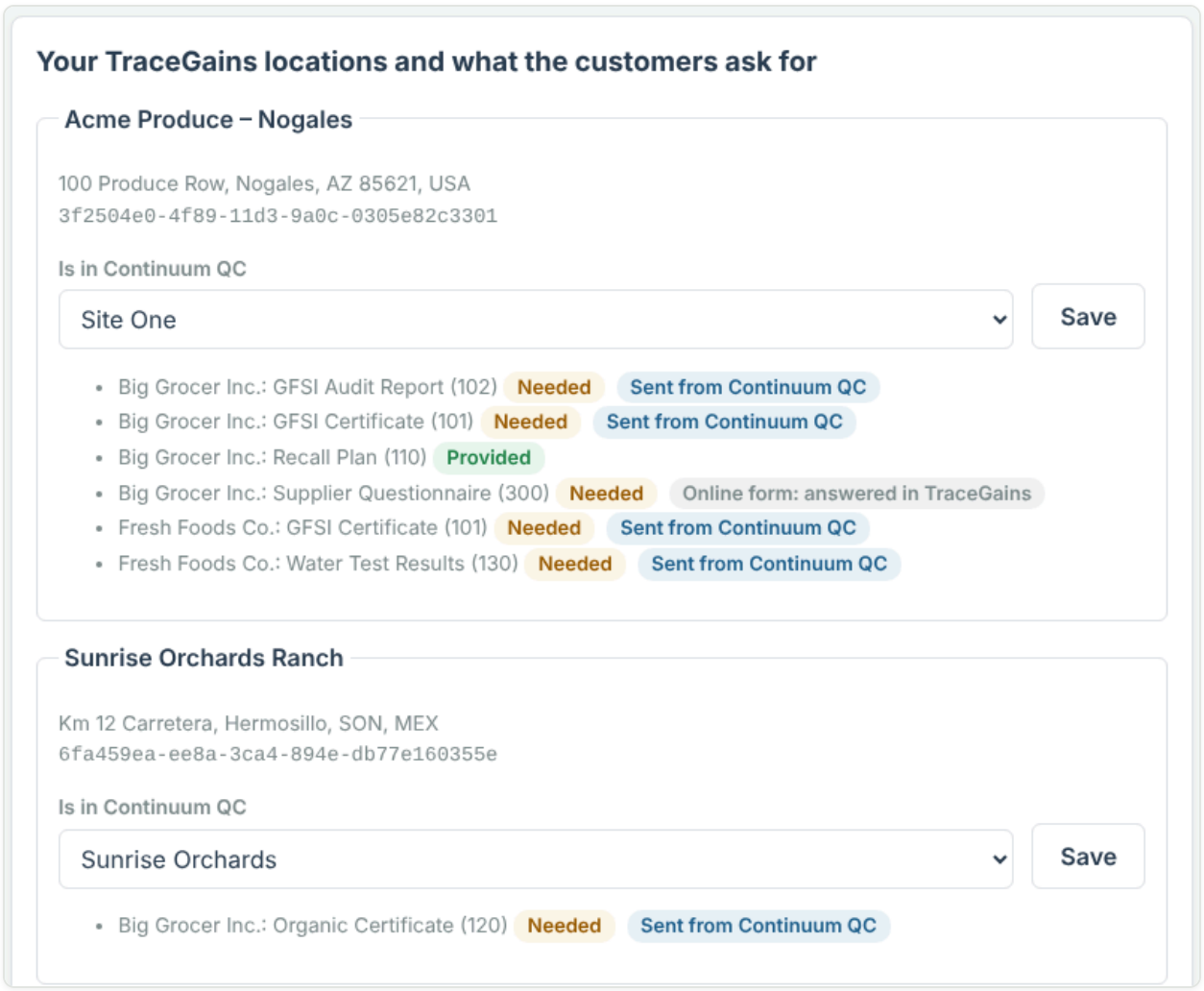
> **Tip:** Each document waits for approval to start with. Once the documents have been right for a while, a system administrator can tick Documents go by themselves (without approval). Those waiting go too. and select Save: those waiting for approval, and those found from then on, are sent by the job within 15 minutes without anyone seeing them first. Unticking it puts those it was to send that nobody had approved back to approval.

YOUR LOCATIONS AND WHAT THE CUSTOMERS ASK FOR

Your TraceGains locations and what the customers ask for lists each of your company's locations in TraceGains, with its address and TraceGains' number for it. A system administrator links each one to what it is in Continuum QC: under Is in Continuum QC, choose one of the sites (active, with QA on), a grower of a site's grower list (under Growers of Site One, for example), or Not linked (nothing is sent), and select Save. Nothing is sent to a location not linked, so a location that

isn’t yours, such as a cold storage you use, can stay unlinked. Unlinking a location takes back its documents not sent yet (Its location was unlinked.).

Under each location come the document types each customer asks of it, as last read: the customer, the document type’s name and its number, such as Big Grocer Inc.: GFSI Certificate (101), Needed or Provided. Sent from Continuum QC marks a type that one of the document types below sends; Online form: answered in TraceGains, a form filled in in TraceGains itself. A location TraceGains no longer lists is marked No longer in TraceGains, and nothing more is sent to it. Quality Control Managers see Is in Continuum QC: and the site or grower of the locations linked to their sites.



The locations read from TraceGains, linked to a site and to a grower

WHAT IS SENT FOR EACH DOCUMENT TYPE

For each document type the customers ask for, a system administrator chooses where the document comes from, under What is sent for each document type:

1. Open Add a document type to send and type the TraceGains document type: its number, picked from those the customers ask for as you type, or typed. Its name (empty: as TraceGains calls it) is taken from the customers' requests; a number they don't ask for needs its name typed (Type the document type's name as TraceGains shows it.).
2. Under What is sent, choose where the document comes from, then which one (see the table below).
3. Check Good for (months), when it has no end date (1 to 36; 12 to start with) and the Language (English or Español), and select Add: Saved. Its documents are looked for when TraceGains is read (Read now, or the job each day).

What is sent	Which one	The document sent
A site's certificate (External Audits)	The program: its name or standard has these words (PrimusGFS, for example)	The site's current certificate of that program (6.30), from its issue date to its end date, sent as a certificate.
The latest audit report (External Audits)	The same	The program's latest recorded audit that passed, with or without conditions, and has its report; good until the program's current certificate runs out, else for the months chosen.
A grower's certificate (Grower Certificates)	Certificate type (any but Other)	The grower's current certificate of that type at the site (6.15), sent as a certificate.
A controlled document (its version in effect)	Controlled document's code	The version in effect of the site's document in use with that code (6.22), good until its next review.

What is sent	Which one	The document sent
The latest passing water test report (Water Testing)	Water source or test has these words (empty: any)	The latest passing result with its report, of a source and a test in use (6.49), good until the test is due again; one already overdue isn't sent.
The latest passing lab test report (Lab Results)	Lab test kind: Any, Pesticide residues, Microbiological or Other	The latest lab test that passed, with its report (6.38): the site's own tests for a location linked to a site, the grower's for one linked to a grower; good for the months chosen.

A site's certificates, audit reports, controlled documents and water reports go to the locations linked to a site; a grower's certificates to those linked to a grower; lab reports to both. The file sent is the record's first PDF, else its first file: a record without a file sends nothing. A document type sends each kind of document once (That document type already has the same kind of document sent: change that one.). Change, on a document type's line, changes it, and its documents not sent yet are looked for again (What is sent for its document type was changed: looked for again.); untick Sent (untick to stop sending it) and select Save to stop it: it shows Not sent. What isn't filled in is refused with its message, such as Choose the TraceGains document type, or type its number., Type words of the program's name or standard (PrimusGFS, for example). or Months: 1 to 36.

What is sent for each document type

For each document type your customers ask for, choose where the document comes from. A site's certificates, audit reports (of passed audits), controlled documents and water reports go to the locations linked to a site; a grower's certificates to those linked to a grower; lab reports to both (a site's own tests, or the grower's). The file sent is the record's first PDF (else its first file).

TraceGains document type	What is sent	
GFSI Audit Report (102)	The latest audit report (External Audits): program "PrimusGFS" English; 12 months when it has no end date	▶ Change
GFSI Certificate (101)	A site's certificate (External Audits): program "PrimusGFS" English; 12 months when it has no end date	▶ Change
Organic Certificate (120)	A grower's certificate (Grower Certificates): Organic English; 12 months when it has no end date	▶ Change
Water Test Results (130)	The latest passing water test report (Water Testing): any source English; 12 months when it has no end date	▶ Change

▼ Add a document type to send

TraceGains document type

110

Its number: pick one the customers ask for, or type it.

Its name (empty: as TraceGains calls it)

What is sent

A site's certificate (External Audits)

The program: its name or standard has these words

PrimusGFS

Good for (months), when it has no end date

12

Language

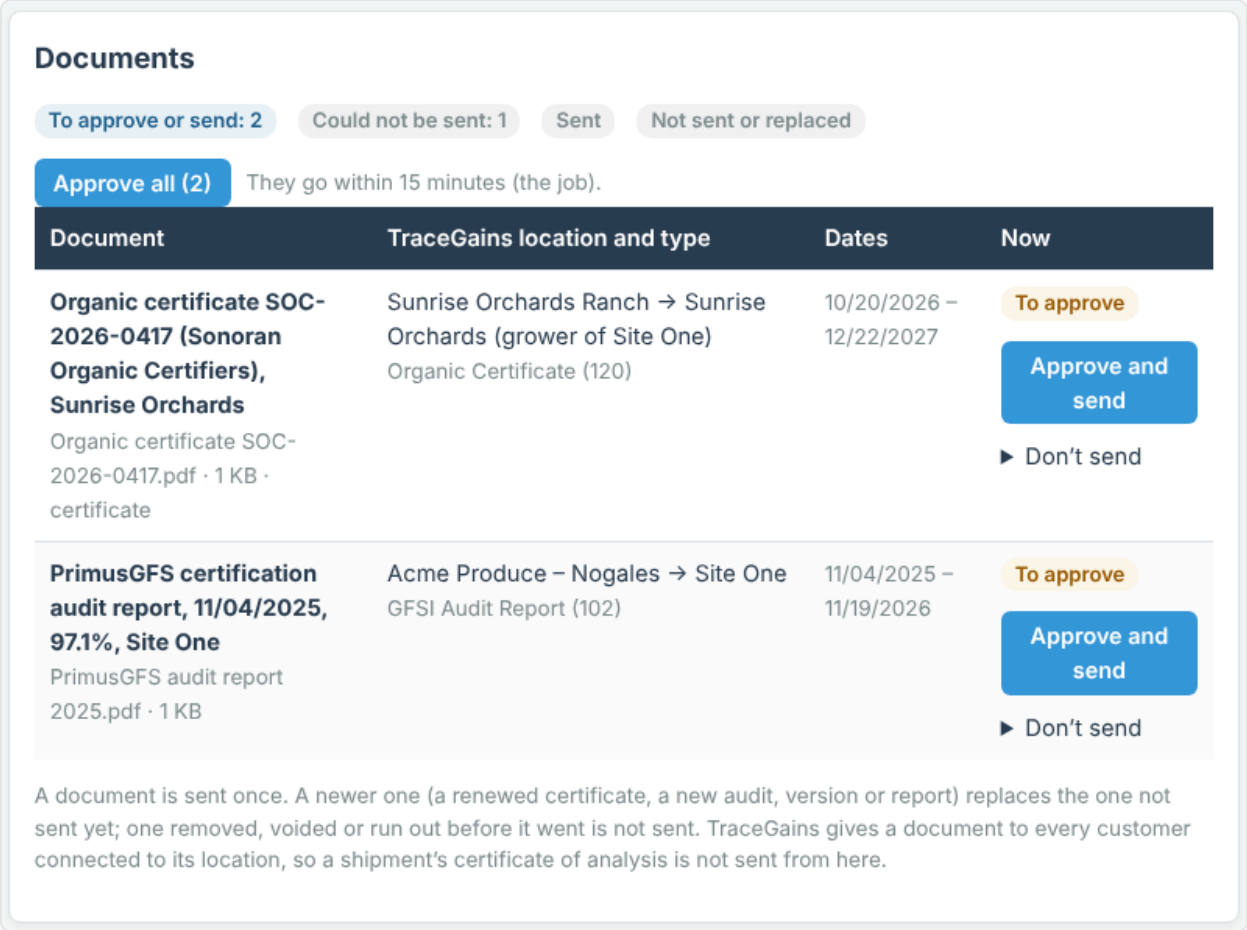
English

Add

Four document types sent, and the form to add one

APPROVING AND SENDING THE DOCUMENTS

Once a day, and with Read now, each location linked and each document type get their current document: a certificate in date, the latest audit with its report, the version in effect, the latest passing report. One found for the first time waits for approval (or is to send, when documents go by themselves); a newer one, such as a renewed certificate, replaces the one not sent yet. Documents lists your sites' documents, the newest first, under To approve or send and Could not be sent (each with how many), Sent, and Not sent or replaced: each with its description and file, the TraceGains location and document type it goes to, its dates, and where it stands Now.



Two documents waiting for approval

1. Open Buyer Compliance on its TraceGains tab, or select TraceGains documents to approve on the Overview or on Today (see 6.60).
2. Check each document: what it is (its number, its site or grower), its file, the location and document type it goes to, and its dates.

3. Select Approve and send: it goes to TraceGains at once (Sent to TraceGains.), and Sent shows when, with TraceGains' number for it (document 5001).
4. Or open Don't send, type Why and select Don't send it: It won't be sent. It is Not sent, with your reason; Send now still sends it later.

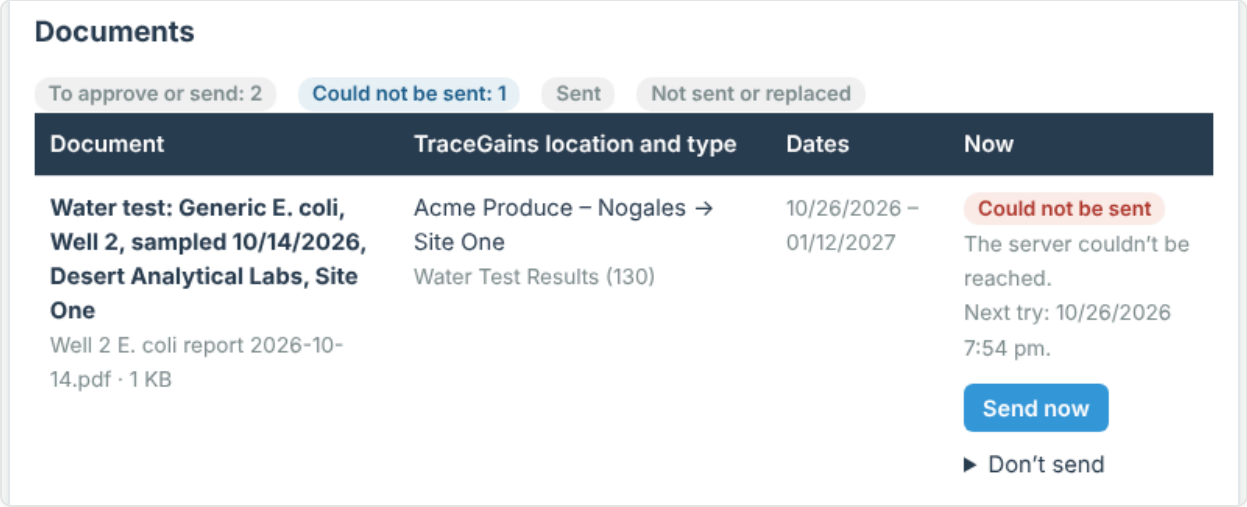
Approve all, shown when more than one document waits, approves them all at once (Approved: 2. They go to TraceGains within 15 minutes (the job).). A Quality Control Manager of the document's site or a system administrator approves, sends and holds it. A document goes only while it is still the current one: when it is sent it is checked again, and one removed, voided or run out before it went, or replaced by a newer one, isn't sent (It is no longer the current one (a newer one, or it was removed, voided or run out): not sent.), nor one whose location is no longer in TraceGains (Its location is no longer in TraceGains.). It goes as the record is then, so a date or a description corrected meanwhile goes corrected.

Each document goes once, with its dates, a description, its language and, for a certificate, that it is one; TraceGains gives it to every customer connected to its location, by its own settings. That is why a shipment's certificate of analysis, meant for one buyer, isn't sent from here, nor are documents of an item (a product).

Status	What it means
To approve	Found; a Quality Control Manager of the site or a system administrator is to approve it.
To send	Approved, or going by itself: the job sends it within 15 minutes.
Sent	Sent, with when and TraceGains' number for it.
Could not be sent	The last try failed: it says why and, when it is tried again by itself, when (see below).
Not sent	Held with Don't send, with the reason.
Replaced	A newer one replaced it, its location was unlinked or its document type changed before it was sent.

WHEN A DOCUMENT COULD NOT BE SENT

A document that could not be sent says why, such as The server couldn't be reached., and is tried again by itself an hour later, then 2, 4 and 8 hours later: five tries in all, then it waits for someone. Send now sends it at once. It isn't tried again by itself when TraceGains refused the document (TraceGains refused the document, with TraceGains' words), doesn't know the location or the document type (TraceGains doesn't know the location or the document type (read TraceGains again, and check the document type number)), or when the file is no longer in Continuum QC.



A document that could not be sent, to be tried again

If the sending was cut off after the file went, the document may have arrived, so it is never sent again by itself: Sending was cut off after the file went, so it may have arrived: check in TraceGains, then send it again or mark it not to send. Look for it in TraceGains: if it is there, use Don't send and say so; if not, select Send now.

When TraceGains refuses the token, or asks to wait because of too many calls (TraceGains asked to wait (too many calls): it is tried again later.), the sending stops for now without counting a try, and Approve and send says It is approved, but couldn't go now: and why. After a refused token nothing more is sent until a system administrator saves a new one, or the new date once TraceGains has extended it, and the top of the tab says The last reading of TraceGains failed: TraceGains refused the token: check it with TraceGains API Support (APISupport@tracegains.com), who may need to extend it, or paste a new one. A

document that could not be sent, or one to send (approved, or going by itself) still waiting two hours later, is a Trend Alert at its site (see 6.13).

HOW EACH SYSTEM WORKS

Systems, for system administrators, lists each system with what it is Used for and its Mode:

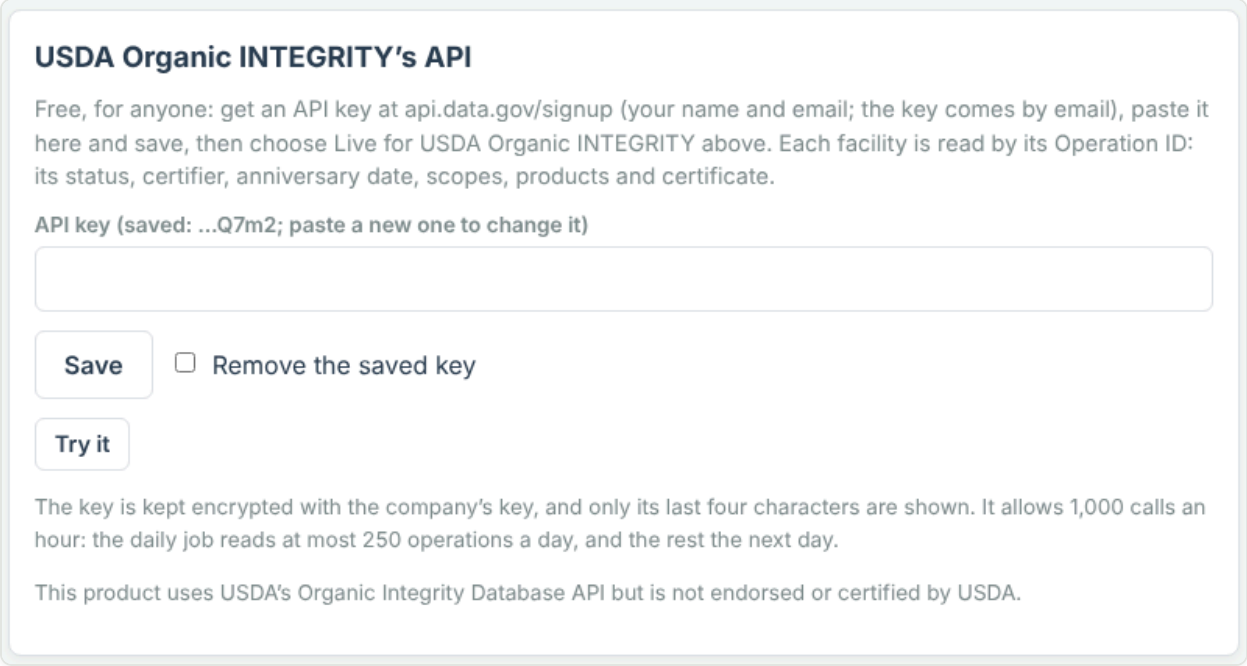
Mode	What it means
By hand	Every system whose API isn't connected: for a real company, all but USDA Organic INTEGRITY once it is Live. The page keeps the dates, the answers and the audit information to copy into the system's portal; you mark what was submitted and what the buyer said, and add the certificates by hand.
Live (API)	Through the system's API. USDA Organic INTEGRITY can be Live once its API key is saved (see USDA Organic INTEGRITY's API, below): its facilities' certificates are then read by themselves. The other systems show Live (API) — waiting for its API, and can't be chosen, until Continuum support connects them; then their questionnaires come, the submissions are sent and the buyer's answers and the certificates are read by themselves.
Simulated (stand-in)	For a demonstration company only: a stand-in plays the system with made-up questionnaires, reviews and certificates (numbers start with SIM-, documents say SIMULATED). A real company can't choose it.

Your account in it (optional) keeps the company's account name in the system, for reference; select Save on its line. TraceGains' line links to the TraceGains tab (Your documents in TraceGains Gather: the TraceGains tab). Under When a year's submission opens, Days before it is due (7 to 180) sets how early each submission opens (60 to start with), with when the daily work was last done.

USDA ORGANIC INTEGRITY'S API

USDA Organic INTEGRITY has a public API that anyone can use with a free api.data.gov key. With it, Buyer Compliance reads each organic facility's certificate by itself, by the facility's Operation ID (Its number in the system). A system administrator sets it up once, on Systems:

1. Get a key at api.data.gov/signup: your name and email address; the key comes by email.
2. Under USDA Organic INTEGRITY's API, paste it in API key (from api.data.gov) and select Save: Saved. Choose Live for USDA Organic INTEGRITY above to read its certificates through the API.
3. Select Try it: USDA Organic INTEGRITY answered and took the key, with how many certified operations the USA has, or USDA Organic INTEGRITY could not be used: and why.
4. In the table above, choose Live (API) as USDA Organic INTEGRITY's Mode and select Save on its line.



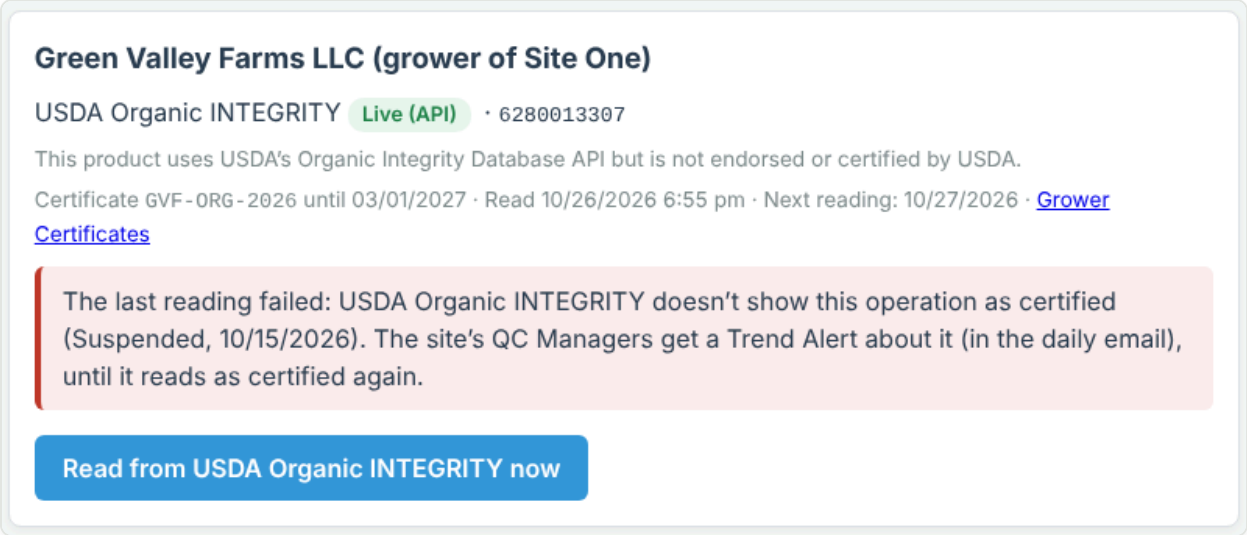
USDA Organic INTEGRITY's API key, saved

Spaces and invisible characters copied with the key are taken out. A key is refused when it has a colon, usually its label copied with it (The API key can't have a colon (:): copy just the key, without its label.), when it has a character a key can't

have, or when it is too short or too long; choosing Live without a key saved is refused too (Save its API key first (below), then choose Live.). The key is kept encrypted with the company's key and only its last four characters are shown; tick Remove the saved key and select Save to remove it; while INTEGRITY is Live, removing the key also puts it back to By hand (The API key is removed. USDA Organic INTEGRITY works by hand now; to read it through the API again, save a key and choose Live.). It allows 1,000 calls an hour, so the daily job reads at most 250 operations a day, and the rest the next day; it stops for the day when INTEGRITY refuses the key or its limit is reached (The API key's limit (1,000 calls an hour) was reached: the rest is read later.). While INTEGRITY is Live, Systems, Facilities and an INTEGRITY facility's page show USDA's notice that this product uses its API but is not endorsed or certified by USDA.

A Certified operation's reading is kept as a certificate added by hand is (see Facilities and Their Certificates): the certificate number its products carry (else NOP and the Operation ID), the certification year up to the anniversary date (a year from its status date when INTEGRITY has none), the certifier, the certified scopes (Crops, Handling…), the certificate's PDF when INTEGRITY gives one, and a note with the operation's name as INTEGRITY has it, the status date, the anniversary date, the date of INTEGRITY's data and the certified products. The name shows whether the Operation ID typed is the right company's.

An operation INTEGRITY no longer shows as certified (Surrendered, Suspended or Revoked) is a failed reading that says so, and the site's Quality Control Managers get a Trend Alert about it (see 6.13); it is read again the next day. An Operation ID INTEGRITY doesn't know gives The system doesn't know that number.; none typed, Type its Operation ID (from Organic INTEGRITY) on the facility first.



A facility INTEGRITY no longer shows as certified

> **Note:** While USDA Organic INTEGRITY works by hand, its facilities' certificates are downloaded and added by hand, like Azzule's. Site Setup shows the step Organic facilities read from USDA Organic INTEGRITY's API (key saved, Live) while organic facilities are read (see 6.58).

6.65 Market Prices

Traceability > Market Prices shows the USDA Market News prices that Agency Connections reads every day (see 6.63) as a report for one commodity: how its price moves, how it compares with a week, four weeks and a year before, how its origins, packages and sizes compare, and the company's own shipments and customer claims of that commodity, week by week, beside the market. It also opens from the Prices tab of the Market News connection in Agency Connections. Prices are per package, as each report gives them: a line's price is the middle of its "mostly" range when the report gives one, otherwise the middle of its low–high range. It is the last page of the Traceability menu, after Buyer Compliance (see 6.64).

Who	What they do
System administrators	See the prices of every commodity read, draw and compare its lines, download the weeks and print, with the shipments and customer claims of every site.
Quality Control Managers	The same, with the shipments and customer claims of their sites only. The prices are the same for everyone.

> **Note:** The page only shows prices: it changes nothing. Which reports are read, and when, is set on the Market News connection in Agency Connections (see 6.63). Users and growers don't have this page.

CHOOSING THE COMMODITY AND THE PERIOD

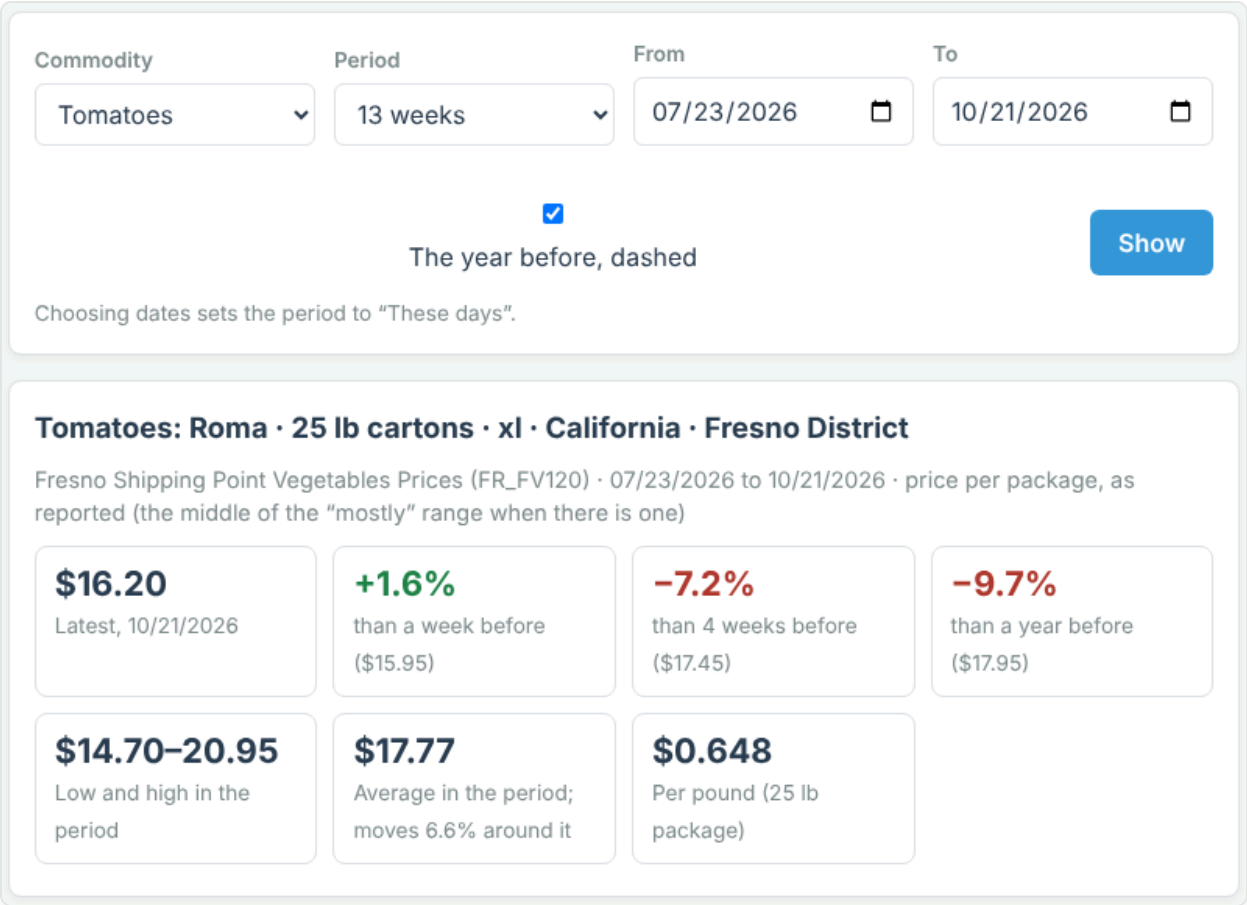
1. Under Commodity, choose one of the commodities with prices. The first time, the page shows the one with the most prices in the last year.
2. Under Period, choose 4 weeks, 13 weeks (the first time), 26 weeks, 1 year or 2 years, which end on the commodity's latest report day; or choose the days under From and To, which sets the period to These days.
3. Leave The year before, dashed ticked to see the same weeks of the year before, or untick it.
4. Select Show.

A line is one series of a report: the same variety, package, size, origin and market, such as Roma · 25 lb cartons · xl · California · Fresno District. The report shows the line with the most report days in the period, or the lines chosen (see Every Line Side by Side). Its heading names the commodity and the line; below it are the report's title and the dates. If From is after To, one of the dates is missing, or the two dates are more than 1,100 days (about 3 years) apart, the latest 13 weeks are shown instead, and the page says why above the chart: From is after To: the latest 13 weeks are shown., Type both dates (mm/dd/yyyy): the latest 13 weeks are shown. or The dates can be at most 3 years apart: the latest 13 weeks are shown. Choosing another commodity clears the lines chosen.

THE LATEST PRICE AND ITS CHANGES

Below the heading, the tiles give the figures of the line:

- Latest: the latest price, with its report day.
- than a week before, than 4 weeks before and than a year before: the change, in percent, from the price 7, 28 and 364 days before the latest one, shown in parentheses (green when the price went up, red when it went down). The earlier price is that of the latest report on that day or up to 6 days before it; when there is none, the tile says no report then.
- Low and high in the period: the lowest and highest prices of the days' ranges.
- Average in the period; moves 6.6% around it: the average price, and how far the price strays from it (the standard deviation as a share of the average). A steady price moves little; a price that swings moves a lot.
- Per pound (25 lb package): the latest price divided by the package's weight, when the package says it in pounds or kilograms (kilograms are turned into pounds).

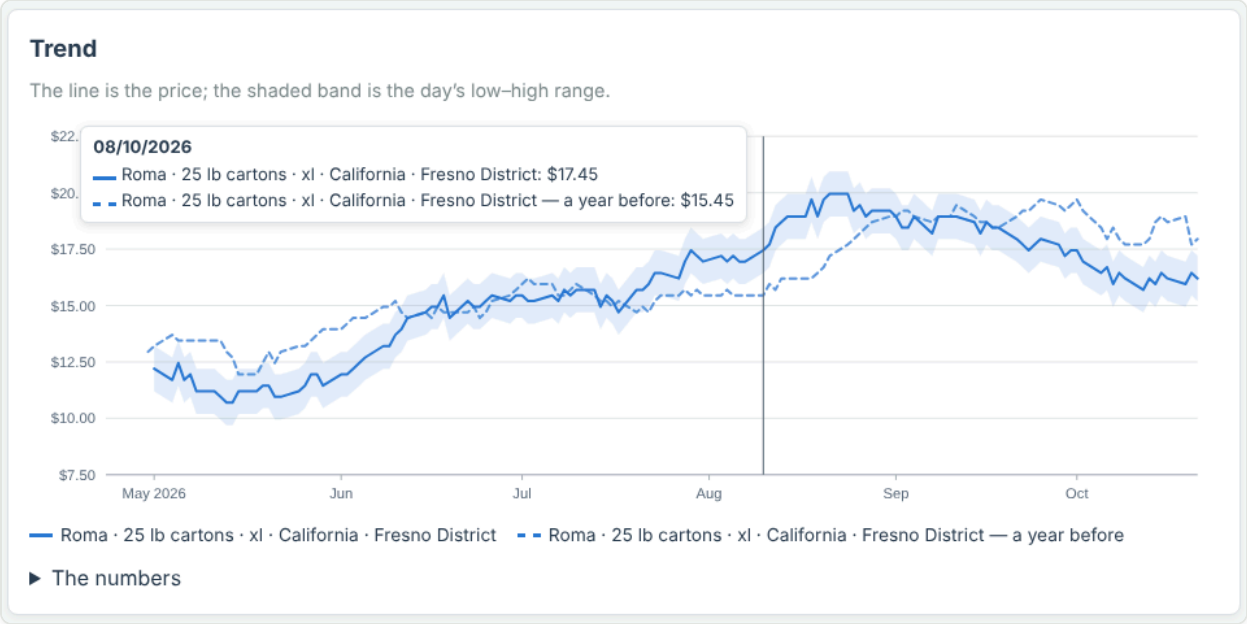


Tomatoes over 13 weeks: the choices and the figures of the line

THE TREND

Trend draws each line day by day. A line drawn alone has a shaded band: each day’s low–high range. With The year before, dashed ticked, the same line a year before is drawn dashed in the same color, moved 364 days on, so that each day sits beside the same weekday of the year before. A gap of more than three weeks without reports, such as the end of a season, breaks the line; a single report day shows as a dot.

Point at the chart (or touch it on a phone or tablet): a vertical line marks the nearest report day and a box gives that day’s price of each line. The numbers, below the chart, opens a table with each day’s prices, newest first.



A line over 26 weeks, the year before dashed, a day pointed at

EVERY LINE SIDE BY SIDE

Every Tomatoes line, side by side (with the commodity's name) lists the commodity's lines in the period, grouped by origin and market, then by variety, package and size: the Report, the Latest price with its day, its change In a week and In 4 weeks, and the price Per lb where the package says its weight. Per lb compares lines sold in different packages: a 25 lb carton at $16.20 is $0.648 a pound.

To draw several lines together:

1. Tick up to six lines in the list (the line drawn now is already ticked).
2. Select Draw the ticked lines.

Every Tomatoes line, side by side

By origin, then variety, package and size: the latest price, its change in a week and in four, and the price per pound where the package says its weight. Tick up to 6 to draw them together.

	Variety · package · size	Report	Latest	In a week	In 4 weeks	Per lb
California · Fresno District						
☑	● Roma · 25 lb cartons · xl	Fresno Shipping Point Vegetables Prices (FR_FV120)	$16.20 10/21/2026	+1.6%	−7.2%	$0.648
Mexico						
☐	Grape · flats 12 1-pint containers with lids	Mexico Crossings through Nogales, AZ: Tomatoes	$12.33 10/21/2026	−7.5%	−8.4%	—
☐	Roma · 25 lb cartons · lg	Fresno Shipping Point Vegetables Prices (FR_FV120)	$13.95 10/20/2026	—	—	$0.558
☐	Roma · 25 lb cartons · xl	Fresno Shipping Point Vegetables Prices (FR_FV120)	$15.95 10/20/2026	—	—	$0.638
☐	Roma · 25 lb cartons loose · lg	Mexico Crossings through Nogales, AZ: Tomatoes	$10.33 10/21/2026	−9.8%	+18.7%	$0.413
☑	Roma · 25 lb cartons loose · xl	Mexico Crossings through Nogales, AZ: Tomatoes	$12.95 10/21/2026	+4.0%	+13.1%	$0.518
☑	Round · 25 lb cartons loose · 5×6	Mexico Crossings through Nogales, AZ: Tomatoes	$14.83 10/21/2026	−6.3%	+6.3%	$0.593

Draw the ticked lines

Every Tomatoes line, three of them ticked

Each line drawn keeps a colored dot in the list. Trend draws them in their colors (without the shaded band), each with its year before dashed, and a legend names them. The lines drawn, compared lists them with the Latest price, the change In a week, In 4 weeks and In a year, the Average, how much each Moves and the price Per lb. The tiles and Week by week are those of the first line ticked in the list.



The lines drawn, compared

Line	Latest	In a week	In 4 weeks	In a year	Average	Moves	Per lb
Roma · 25 lb cartons · xl · California · Fresno District	$16.20 10/21/2026	+1.6%	−7.2%	−9.7%	$17.77	6.6%	$0.648
Roma · 25 lb cartons loose · xl · Mexico	$12.95 10/21/2026	+4.0%	+13.1%	−3.7%	$10.89	8.9%	$0.518
Round · 25 lb cartons loose · 5×6 · Mexico	$14.83 10/21/2026	−6.3%	+6.3%	−23.8%	$13.74	6.9%	$0.593

"Moves": how far the price strays from its average in the period (the standard deviation as a share of the average).

Three lines drawn together, and compared

> **Note:** At most six lines are drawn together: if more are ticked, the first six in the list are drawn.

YOUR SHIPMENTS AND CLAIMS, WEEK BY WEEK

Your weeks beside the market shows, on the same dates as the trend, the company's own weeks of that commodity: Shipped, the quantity of the shipping events recorded in Traceability Events (see 6.61), in the unit used most, such as cases (when no quantities were recorded, the number of shipments), and Customer claims received, the claims of Customer Claims (see 6.10) by the week they were received. A claim counts when its inspection is of that commodity; a

claim without an inspection isn’t counted. Voided events don’t count, and a corrected one counts once. Point at a bar to see its week and number. The card appears only when there are shipments or claims in the period.

Quality Control Managers see the shipments and claims of their sites, and system administrators those of every site. A commodity of the company is matched to the Market News commodity by its English name, singular or plural, or by the names typed under Your commodities in Market News on the Market News connection’s Settings (see 6.63).

Week by week lists the weeks of the line (of the first one, with several), newest first, each from Monday: the Average, the Low–high range, the Change from the week before, A year before and the change Against it (with the year before shown), and Shipped and Claims when the company has them. The latest 13 weeks are shown; Show all 14 weeks (with their number) shows the rest. The first and last weeks of the period may have fewer report days.

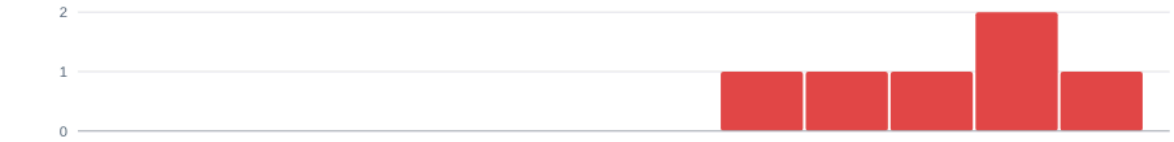
Your weeks beside the market

Tomatoes at your sites, by week, on the same dates as the trend above. In produce, claims tend to rise when the market falls.

Shipped (cases, Traceability Events)



Customer claims received (Customer Claims)



Week by week: Roma · 25 lb cartons · xl · California · Fresno District

Week of	Average	Low–high	Change	A year before	Against it	Shipped (cases)	Claims
10/19/2026	$16.20	$14.95–17.45	+0.6%	$18.20	−11.0%	3,011	
10/12/2026	$16.10	$14.70–17.45	−1.5%	$18.40	−12.5%	1,131	1
10/05/2026	$16.35	$14.95–17.70	−5.8%	$18.10	−9.7%	469	2
09/28/2026	$17.35	$15.95–18.70	−2.3%	$19.40	−10.6%	480	1
09/21/2026	$17.75	$16.45–18.95	−4.1%	$19.30	−8.0%	463	1
09/14/2026	$18.50	$17.20–19.70	−1.6%	$18.65	−0.8%	546	1
09/07/2026	$18.80	$17.20–19.95	0.0%	$19.00	−1.1%	596	
08/31/2026	$18.80	$17.45–20.20	−2.8%	$19.05	−1.3%	520	
08/24/2026	$19.35	$17.95–20.95	−0.5%	$18.20	+6.3%	472	
08/17/2026	$19.45	$17.95–20.95	+6.6%	$16.55	+17.5%	508	
08/10/2026	$18.25	$16.45–19.95	+7.0%	$15.90	+14.8%	496	
08/03/2026	$17.05	$15.95–18.20	+0.6%	$15.50	+10.0%	400	
07/27/2026	$16.95	$15.20–18.45	+3.0%	$15.55	+9.0%	369	

Show all 14 weeks | Download the weeks (CSV) | Print

The company's shipments and claims beside the market, week by week

Tip: Claims on produce tend to rise when the market falls. Reading the claims beside the price helps tell a claim about quality from one that follows a falling market.

DOWNLOADING AND PRINTING

Download the weeks (CSV) downloads the weeks of every line drawn, in a file named like market_prices_Tomatoes_2026-07-23_2026-10-21.csv, with the columns Week of, Commodity, Line, Origin, Report, Average, Low, High, Report days, Per lb and Same week a year before. It opens in Excel with accents shown right. Print prints the report without the choices and the buttons, with all its weeks.

6.66 Cross-site Reports

Overview > Cross-site Reports answers, in one list, the questions that otherwise take one report per site: how each grower did across the sites they deliver to, which customers claim the most and where, and how each commodity is doing. It covers one site, a site group, sites you choose, one of your saved views or all your sites with QA on (see 6.68), for a period of up to 13 months. Each figure links to the page behind it at its site. The page only reads what is recorded; it changes nothing. It is in the Overview menu, after Company Overview.

Who	What they see
System administrators	Every active site with QA on.
Quality Control Managers	Their active sites with QA on.

The page goes with Company Overview: whoever has Company Overview has Cross-site Reports, and it has no permission of its own. Users don’t have it.

CHOOSING WHAT TO SHOW

1. Go to Overview > Cross-site Reports.
2. Choose the tab: Growers, Customers or Commodities.
3. Under Sites, choose All my sites, a view, a site group or one site, or Choose sites… to tick certain sites (see 6.68). Choosing one shows the report for those sites at once.

4. Under Period, choose Last 30 days, Last 90 days (to start with) or Last 365 days, or Dates... and the From and To dates.
5. If you want, choose a Commodity, type part of a name in Find by name, and, on Growers, tick Only growers with lots in the period. Select Show.

The line above the table sums up what is shown, for example 8 growers · 3 sites · 10/27/2025 – 10/26/2026 · 1 at more than one site. The rows are 50 to a page, with Previous and Next below them, and the last row, All N, adds up every row of every page.

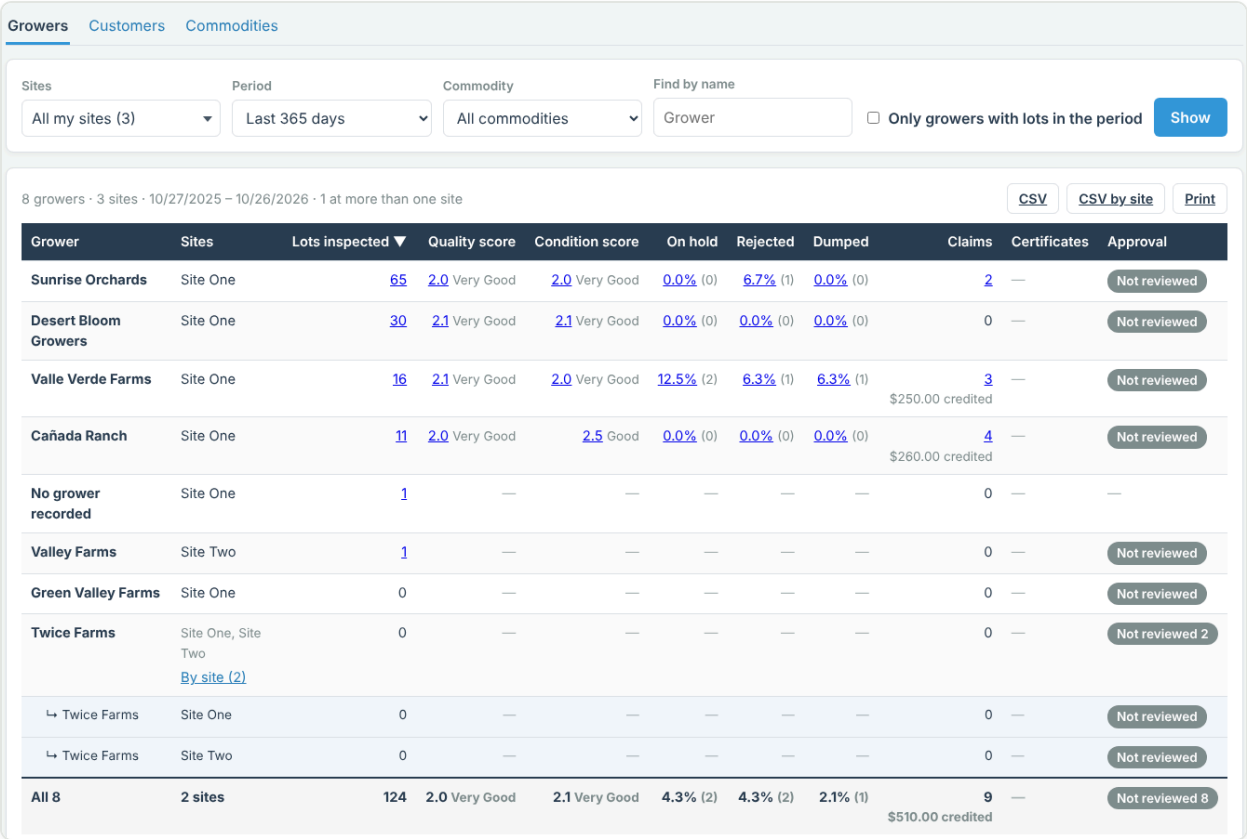
> **Note:** Dates cover at most 13 months: with From earlier than that, the page says The report covers at most 13 months: it starts on ... and starts there.

GROWERS

One row for each grower on the grower lists of the sites chosen, with the sites they are on. Without a commodity chosen, every grower on the lists is shown, also those with no lots in the period; with a commodity, only its lots count.

Column	What it shows
Lots inspected	The grower's lots inspected in the period, as Grower Scorecards counts them (see 6.11).
Quality score, Condition score	The average scores, from 1 Excellent to 5 Poor (lower is better), with their grade, such as Very Good.
On hold, Rejected, Dumped	The share of the lots with a decision that are on hold, rejected or dumped now (see 6.7), and how many.
Claims	The customer claims about these lots, whenever received, with the amount credited (see 6.10).
Certificates	The required certificates expired or missing today, as Grower Certificates flags them (see 6.15).

Column	What it shows
Approval	Each site's current decision on Approved Growers (see 6.21): Not reviewed, Approved, Conditional, Suspended or Not approved; with several sites, how many have each.



Growers across three sites, one of them open by site

> **Note:** Each site keeps its own grower list, so the same grower at several sites is matched by its name, ignoring capitals and extra spaces: two different growers with the same name show as one, and a grower spelled differently at two sites shows twice. Lots with no grower recorded are on the row No grower recorded.

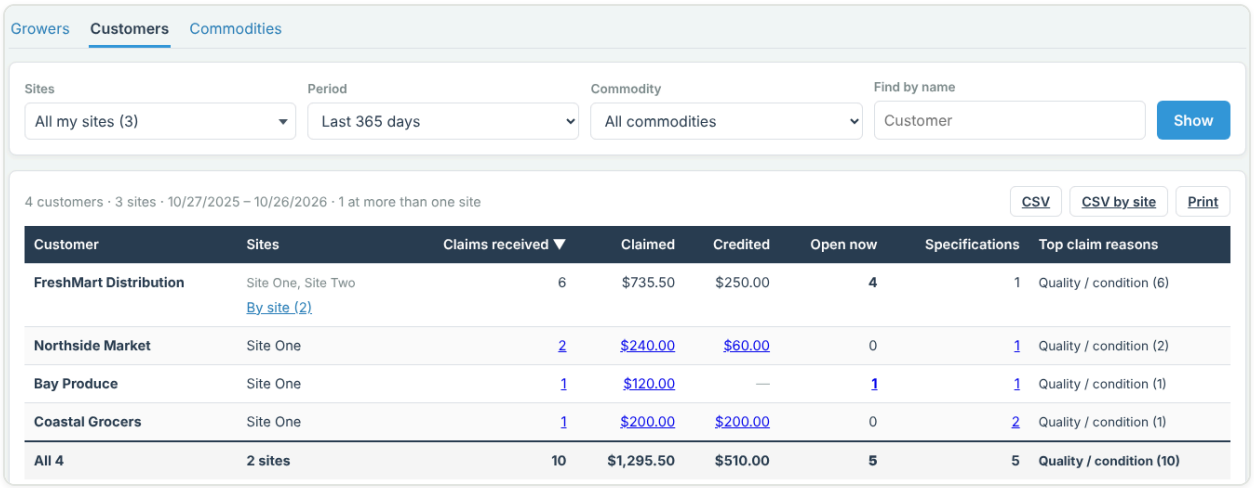
CUSTOMERS

One row for each customer of the sites chosen: the customers of Customer Specifications (see 6.24) and the names typed on claims, matched by name

across sites as growers are. The rows start with the most claims received.

Column	What it shows
Claims received	The customer's claims received in the period, as Customer Claims lists them (see 6.10).
Claimed, Credited	The amounts claimed and credited on those claims.
Open now	The customer's claims still open, whenever received.
Specifications	The customer's specifications in force today (see 6.24).
Top claim reasons	The three most frequent reasons of the claims received, with how many.

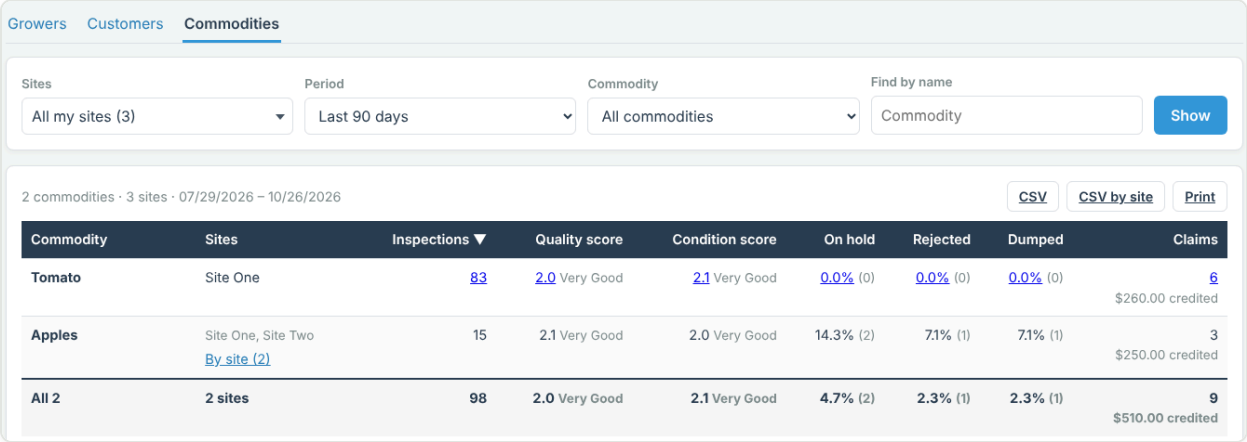
With a commodity chosen, only the claims about lots of that commodity and its specifications count.



Customers across sites, the most claims first

COMMODITIES

One row for each commodity inspected at the sites chosen: Inspections in the period, the average Quality score and Condition score, the share On hold, Rejected and Dumped, and the Claims about those lots, as on Growers. A commodity chosen in Commodity shows that one only.



Commodities across sites

A ROW AT SEVERAL SITES, AND THE LINKS

- A row at several sites names the first three (and N more) and adds up their figures; By site (N) under the names opens one line for each site, with that site's figures.
- The figures of a row at one site, and of each By site line, link to the page behind them at that site, when you have the page: on Growers and Commodities, the lots, scores, shares and claims to Grower Scorecards for that grower (or commodity) and period, Certificates to Grower Certificates and Approval to Approved Growers; on Customers, the claims to Customer Claims for that customer and Specifications to Customer Specifications.
- Select a column's heading to sort by it (▲ or ▼ shows the order); select it again to reverse.

CSV AND PRINT

- CSV downloads the whole result, every page, one line per row, with the names of its sites and the From and To dates.
- CSV by site downloads one line for each row at each site.
- Print opens a copy with every row (the By site lines left out) in a new tab and prints it.

> **Note:** With nothing to show: Nothing to show for these sites and this period. (or Nothing matches that name. after Find by name). If the figures can't be read: The report could not be loaded. Try again, or choose fewer sites or a shorter period.

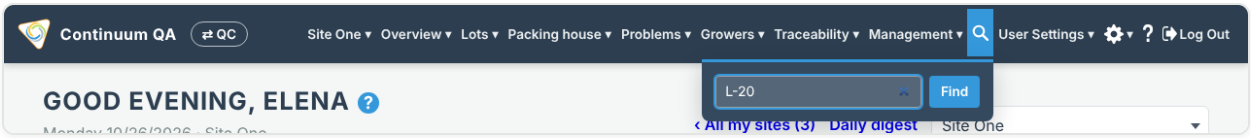
6.67 Search

The search icon on the menu bar, right of the menus and before User Settings, finds at all your sites at once: inspections by serial or lot number, growers, customers, records by their number (such as CA-12), people and the pages you may open. It is there with the QC menus and the QA menus alike, for everyone but grower users; on a phone, its box is at the top of the menu. The results are on the Search page, each with its site and links to where it is dealt with.

Who	Where it searches
Users	Their site, in the groups of the pages they have.
Quality Control Managers	All their sites (with QA or not; records and the QA pages' links only at sites with QA), and People: the Users of their sites.
System administrators	Every site, and People: everyone.

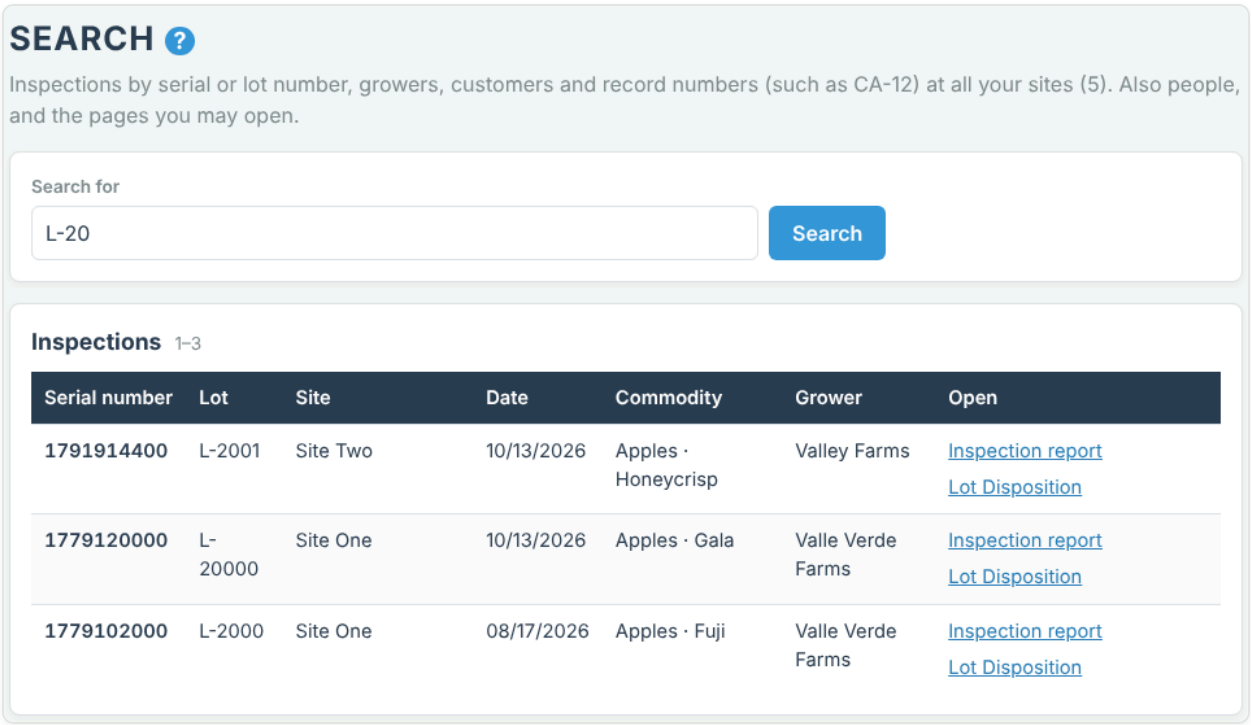
SEARCHING

1. Select the search icon on the menu bar.
2. Type at least 2 characters: a serial or lot number, part of a grower's or customer's name, a record number such as CA-12, or part of a person's name, user name or email, or of a page's name.
3. Select Find, or press Enter. The Search page opens with the results; its own Search for box and Search button search again.



The search box on the menu bar

The results come in groups, each only when you have its pages: Inspections, Growers, Customers, Records, People and Pages. In each, exact matches come first, then those that start with what you typed, then those that contain it. With results in several groups, links at the top, such as Inspections (4) and Customers (1), jump to each. A group shows 20 results; More... shows the next 20 of that group alone, and ← All results goes back to every group.

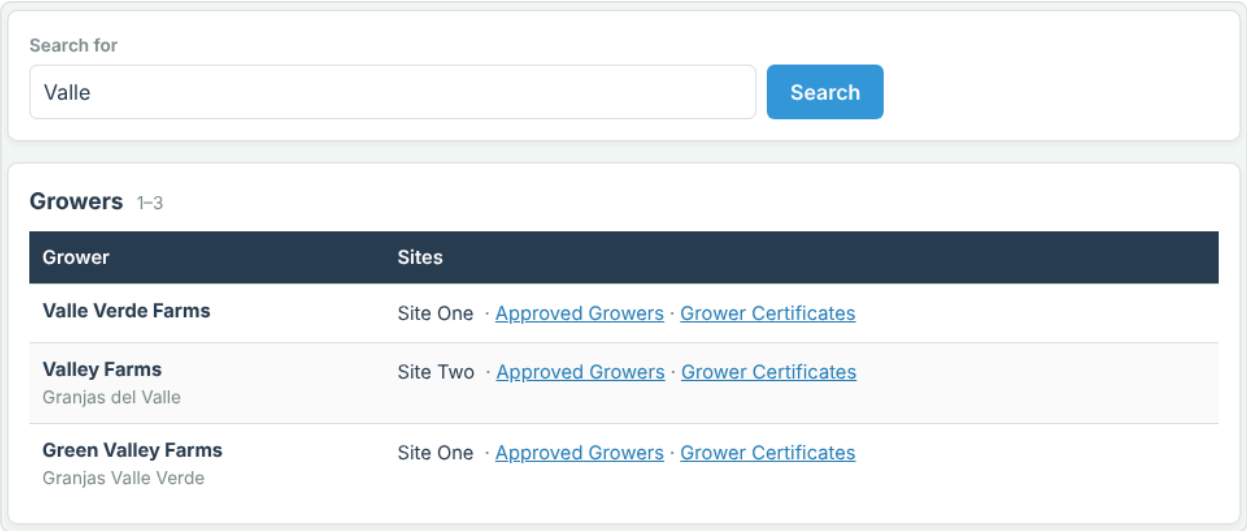


A lot number found at two sites

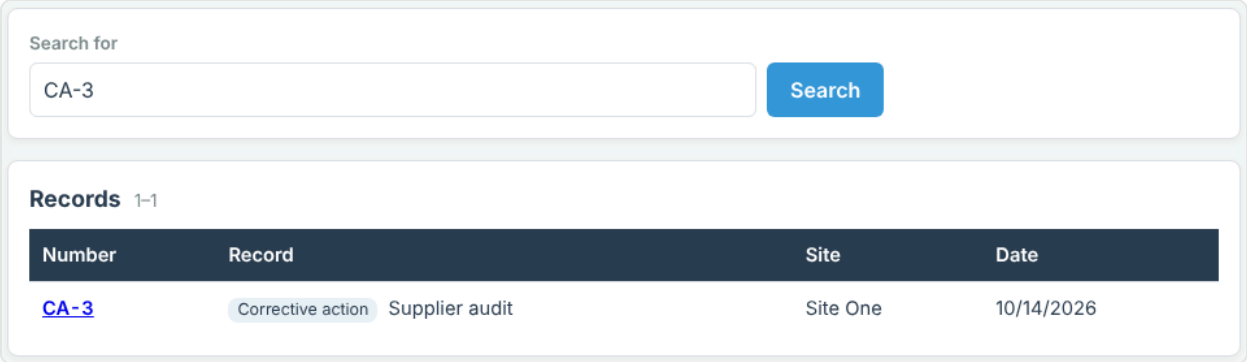
WHAT IS FOUND

Group	What it finds	Its links
Inspections	Inspections by serial number (the whole number, or its first 4 digits or more) or lot number (the answer to the Lot question), the newest first, with their site, date, commodity and grower. For those with an inspection report, Lot Disposition or Edit Quality Inspections.	Inspection report (in a new tab); Lot Disposition, at a site with QA (see 6.7).
Growers	Growers on the sites' grower lists, by their name in English or Spanish, one row per name with its sites (up to 12 named, then and N more sites); a grower made inactive at a site says so.	Approved Growers and Grower Certificates at each site with QA (see 6.21, 6.15).
Customers	The customers of Customer Specifications at sites with QA, by name or customer number, with their sites.	Customer Specifications (see 6.24).

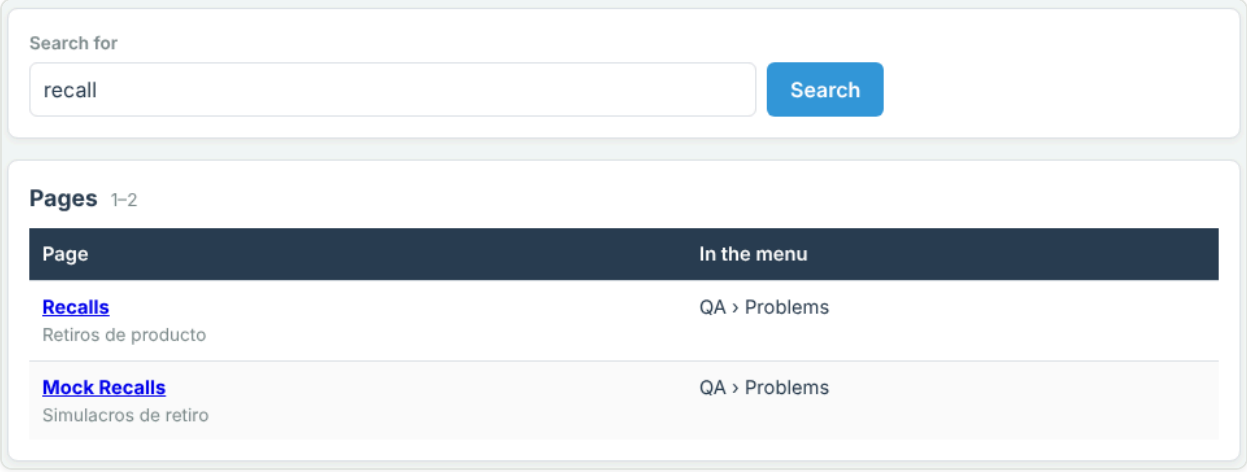
Group	What it finds	Its links
Records	Records at sites with QA by their number: CA corrective action, CL customer claim, NC non-conforming product, RC recall or mock recall, AR grower action request, LD load inspection (LD-00012), LT lab test, SL shelf-life sample, CH change, EA external audit, IA internal audit, MR management review, EM environmental monitoring case, FA field audit, FD food defense incident, WO work order. CA-12, ca 12 and CA12 all work; a number alone, such as 12, finds each kind with that number. Only the kinds whose page you have.	The record, on its page.
People	Quality Control Managers and system administrators: people by name, user name or email, those they see on People (3.7 of the user manual).	Their page on People.
Pages	The pages you may open whose English or Spanish name has what you typed, accents and capitals aside, with the name in the other language below and where the page is in the menus (In the menu).	The page.



Growers found by part of their name



A record found by its number



Pages found by their name

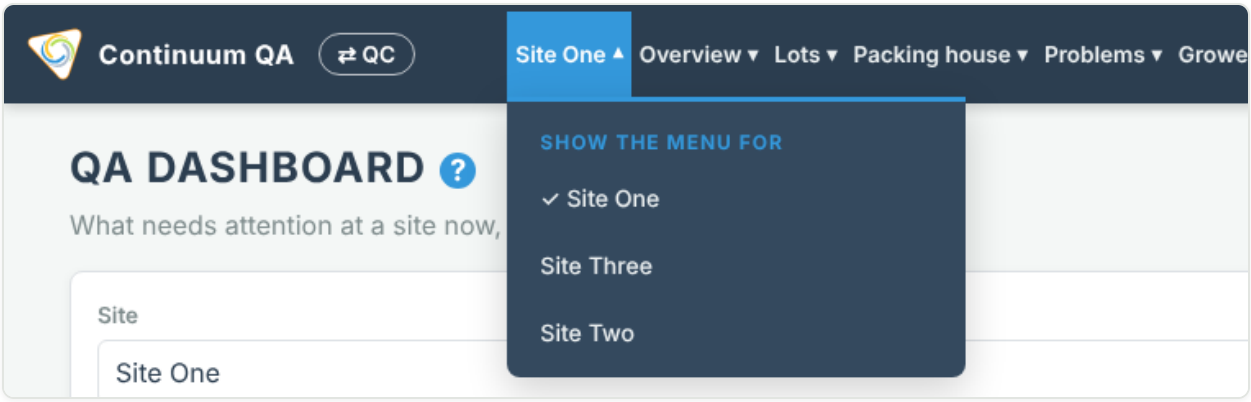
> **Note:** With fewer than 2 characters: “4” is too short: type at least 2 characters. With nothing found: Nothing found for “...”. A group that fails says This part could not be searched. Try again in a moment.; the other groups are still shown. Up to 60 characters are looked for.

6.68 Choosing Sites and Saved Views

Someone with several sites, such as a Quality Control Manager of many sites or a system administrator, chooses the sites to work with in three places: the site list on the menu bar, which the menus and the QC pages follow; the Site list of the overview pages, one choice of sites shared by Today, the QA Dashboard, Cross-site Reports and the working lists; and Choose sites, which picks certain sites and keeps them as a named view. Someone with one site sees none of this.

THE SITE LIST ON THE MENU BAR

With two sites or more, one of them with QA at least, the first item of the menu bar, left of the first menu, is the site the menus are for. Select it: under Show the menu for, the QC menus list all your active sites and the QA menus only those with QA, the current one with ✓. Choose a site: the page you are on opens again for it. With more than 10 sites the list has a Type to find... box (No site matches when none does); a long site name is cut on the bar, and the whole name is in its tooltip, Menus for: ....



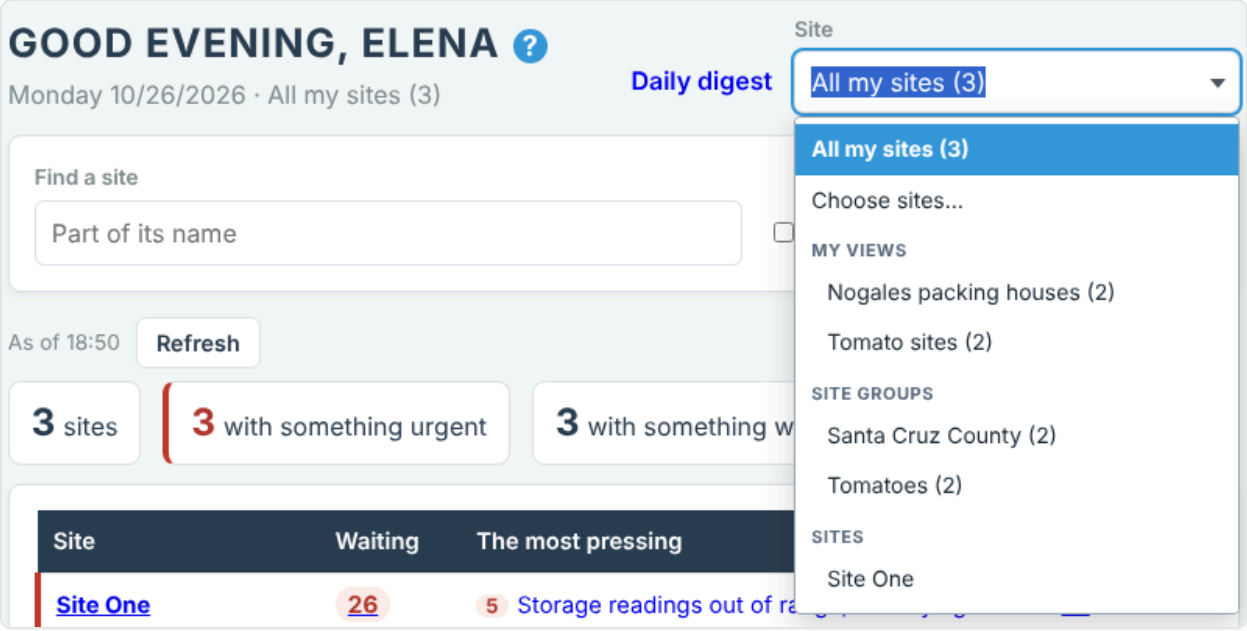
The site list on the menu bar, with the QA menus

- At a site without QA the bar shows the QC menus; ⇄ QA moves the menus to your first site with QA (see A.2).
- A QA page opened for another site with QA moves the menus to that site. The site chosen stays while you are signed in; when you sign in, the menus are for your first site with QA.
- A Quality Control Manager of several sites who opens a QC setup page, such as Add / Change Varieties, starts on the site chosen on the bar.

ONE CHOICE OF SITES FOR THE OVERVIEW PAGES

Today, the QA Dashboard and Cross-site Reports, and the lists of Lot Disposition, Inspection Sign-off, Corrective Actions, Customer Claims, Non-Conforming Product, Recalls, Trend Alerts, Grower Certificates and Calibration Records, share one Site list. It offers, in this order:

- All my sites (N): your active sites with QA (a system administrator: every one).
- N sites chosen, while sites you ticked on Choose sites are shown, and Choose sites..., which opens Choose sites (below).
- My views: your saved views, each with how many of its sites are yours.
- Site groups: the groups with at least one of your sites, each with how many of yours it has (see 6.56).
- Sites: each of your sites with QA, by name.



The Site list of Today, opened

Type in the list to find a choice. What you choose is kept until you sign out and shared by those pages: a site group chosen on Today is the one the QA Dashboard and the lists open with. Until you choose, Today, the QA Dashboard and Cross-site Reports start on All my sites and the lists on the site chosen on the menu bar; after that, every page opens with the choice kept. A site of yours no longer in use, opened by a link, is shown alone, marked * in the list.

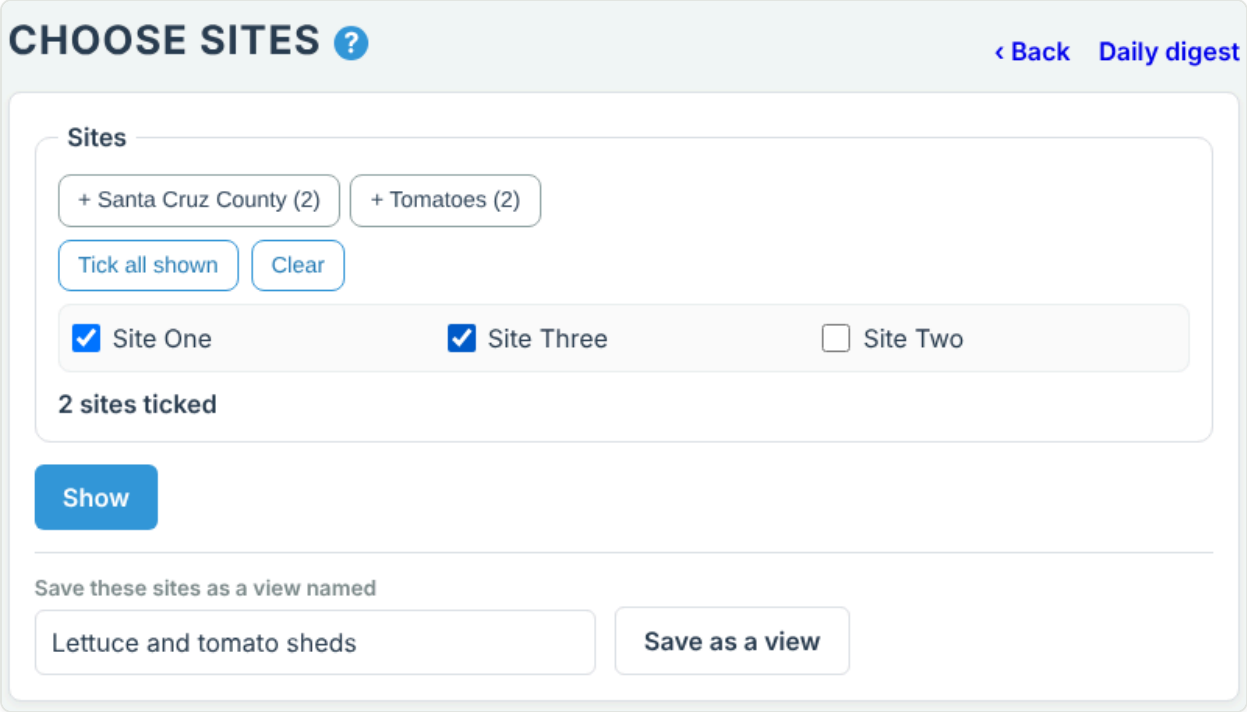
Page	With several sites chosen
Today	All my sites: one row per site with what is waiting there (see 6.60).
QA Dashboard	Each tile adds up the sites; a total opens the sites behind it (see 6.14).
Cross-site Reports	Growers, customers and commodities across those sites (see 6.66).

Page	With several sites chosen
The lists: Lot Disposition, Inspection Sign-off, Corrective Actions, Customer Claims, Non-Conforming Product, Recalls, Trend Alerts, Grower Certificates, Calibration Records	The records of those sites in one list, with a Site column, their filters and counts adding up the sites, 50 a page. Each record opens, and is changed, at its own site. Adding a record and the Settings need one site: Choose a site to add one or change its settings.

> **Note:** Company Overview keeps its own Site group list: all your sites or one group, not sites chosen or views (see 6.59). Shipments and Lots for an order use the same Site list (see 6.70); until you choose, Shipments starts on All my sites and Lots for an order on the site of the menu bar.

CHOOSING SITES

1. In a Site list, choose Choose sites.... The Choose sites page opens; ‹ Back returns to the page you came from.
2. Tick the sites. Each site group has a button, such as + Tomatoes (2), that ticks its sites; with more than 5 sites, Filter sites... shows only those whose name has what you type; Tick all shown ticks those shown, and Clear unticks them all. N sites ticked shows how many.
3. Select Show: the page you came from opens with those sites (N sites chosen in its Site list), or with that site when you ticked one.



Choosing two sites, to show or to keep as a view

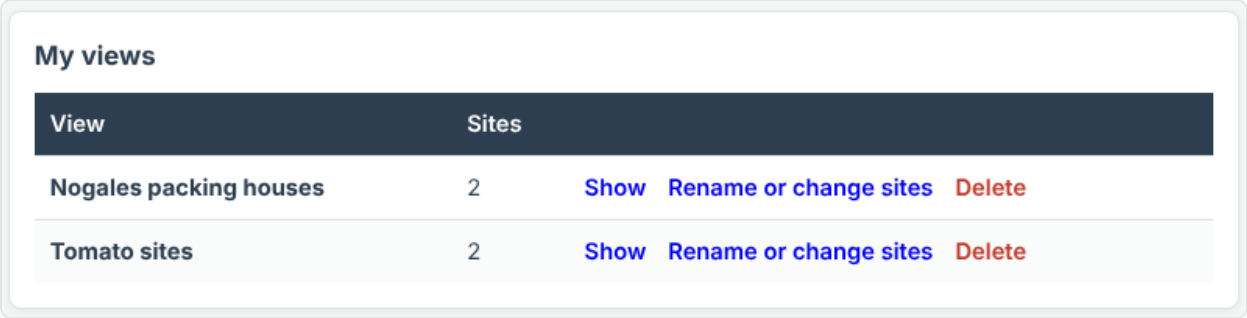
With none ticked: Tick at least one site. Only your sites with QA are offered.

SAVED VIEWS

A view keeps a choice of sites under a name, such as Arizona packing sheds, so that it is one choice in every Site list, under My views, and in the daily digest's Sites (see 6.69). Views are your own: nobody else sees them.

1. On Choose sites, tick the sites.
2. Type a name in Save these sites as a view named (up to 80 characters).
3. Select Save as a view. The page you came from opens with the view chosen.

My views, below, lists your views with how many of their sites are yours, and for each Show, Rename or change sites and Delete. Rename or change sites opens Change the view "…": change the Name or the sites and select Save changes (The view was changed.). Delete asks Delete the view "…"? first (The view was deleted.).



A Quality Control Manager's views

- A view's name must be new among yours: Give the view a name., You already have a view with that name., The name can be at most 80 characters.
- You can have up to 50 views: You can have at most 50 views: delete one first.
- A site that is no longer yours is left out of the view, and My views says so: (1 no longer yours).
- A daily digest that covered a deleted view covers all your sites from then on.

> **Tip:** Any long list on the QA pages, such as a Site list with many sites, is searchable: select it and type part of a name.

6.69 Daily Digest

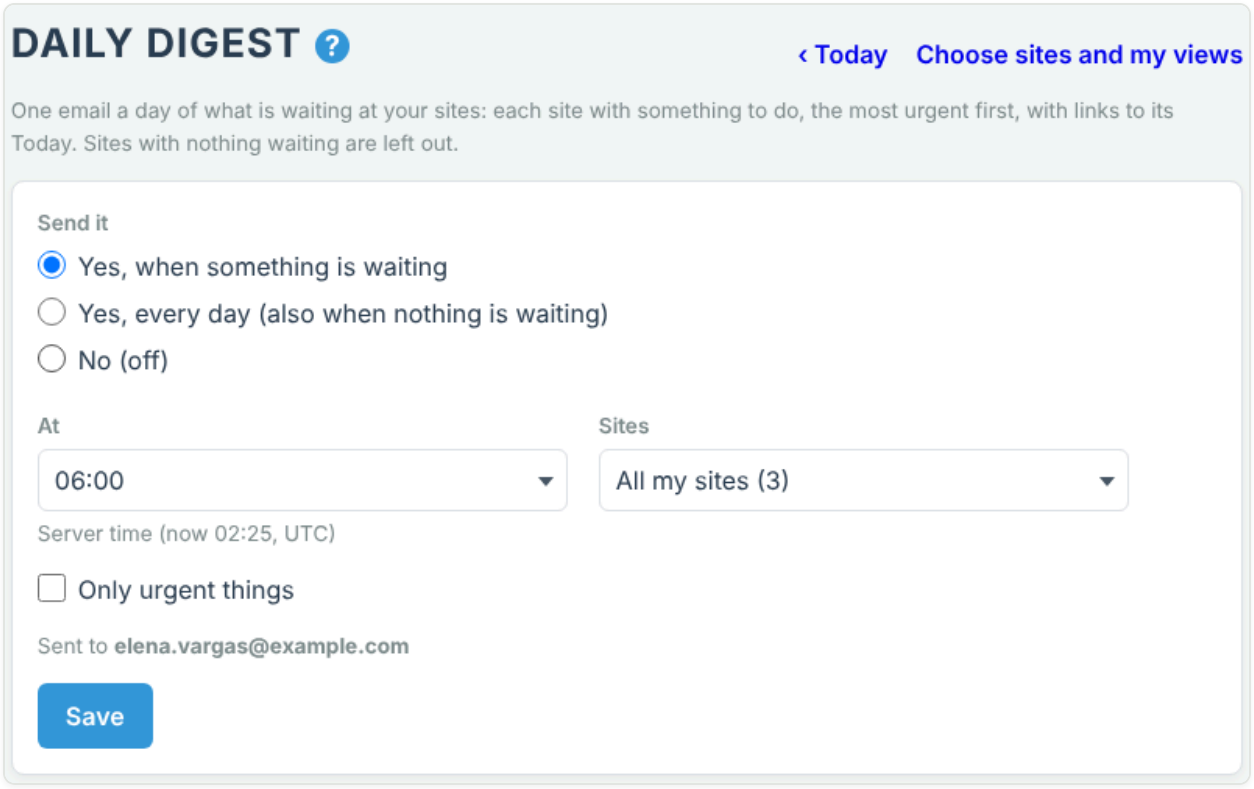
The daily digest is one email a day of what is waiting at your sites: each site with something to do, the most urgent first, with links to its Today and to the pages where each thing is dealt with. It is made for a Quality Control Manager of many sites, who can't open each site's Today every morning. Each person turns their own on or off, chooses the hour and, with several sites, which of them it covers. The page is linked from Today (Daily digest, at the top right; with several sites, beside the Site list) and from Choose sites.

Who	What they do
Everyone at a site with QA: Users, Quality Control Managers and system administrators	Set up their own digest, and read in it the lines of the pages they have.

Who	What they do
Continuum support	Runs the sending on the server, every hour.

SETTING UP THE DIGEST

1. On Overview > Today, select Daily digest.
2. Under Send it, choose Yes, when something is waiting; Yes, every day (also when nothing is waiting); or No (off), the setting to start with.
3. Choose the hour in At (06:00 to start with). It is the server's time, shown beside it (Server time (now 02:25, UTC)), not your time zone's.
4. With several sites, choose the Sites: All my sites (N), one of your views or a site group (see 6.68).
5. If you want, tick Only urgent things.
6. Select Save: Saved.



The daily digest's settings

Sent to shows your email address, and the date of the last one once one was sent. Without a valid address the page says Your account has no valid email address, so the digest cannot be sent: ask your administrator to add one. When the group or view chosen is no longer yours, the page says The site group or view chosen is no longer yours: the digest covers all your sites.

WHAT IT WOULD SAY NOW

Below the settings, What it would say now shows the digest as it would be sent: the sites it covers and when their figures were counted (As of 18:50), then each site with something waiting, those with the most urgent things first, with its lines: how many, in red when urgent, and what, each opening its page at that site. The site’s name opens its Today. The lines are those of Today (see 6.60), only those of the pages you have, and the site’s new Trend Alerts.

What it would say now

All my sites (3) · As of 18:50

Site One · 12 urgent

- 5 Storage readings out of range, not saying what was done
- 4 Corrective actions overdue
- 2 Lots awaiting a decision
- 2 Breakages not cleared
- 2 Non-conforming product waiting for a decision
- 2 Instruments overdue for calibration
- 2 Facility certificates that could not be read
- 1 Files for agencies that could not be sent
- 1 Pre-op today, not released
- 1 Urgent work orders open
- 1 Buyer submissions returned by the buyer
- 1 TraceGains documents that could not be sent
- 35 New trend alerts
- 5 Harvest records waiting to be packed
- 4 Customer claims open
- 3 Lots sent to customers not recorded in Traceability yet
- 3 Buyer submissions due within 30 days or late
- 2 Lots on hold
- 2 Inspected lots not recorded in Traceability yet
- 2 Cleaning to do
- 2 Environmental swabs to take
- 2 TraceGains documents to approve
- 1 Cleaning to verify
- 1 Wash water start-up checks to do today
- 1 Metal detector start-up checks to do today
- 1 Security check still to do
- 1 Facility certificates that run out within 30 days

Site Two · 6 urgent

- 6 Instruments overdue for calibration
- 2 Pre-op today, not released
- 1 Files for agencies that could not be sent
- 1 Storage readings out of range, not saying what was done

What the digest would say now

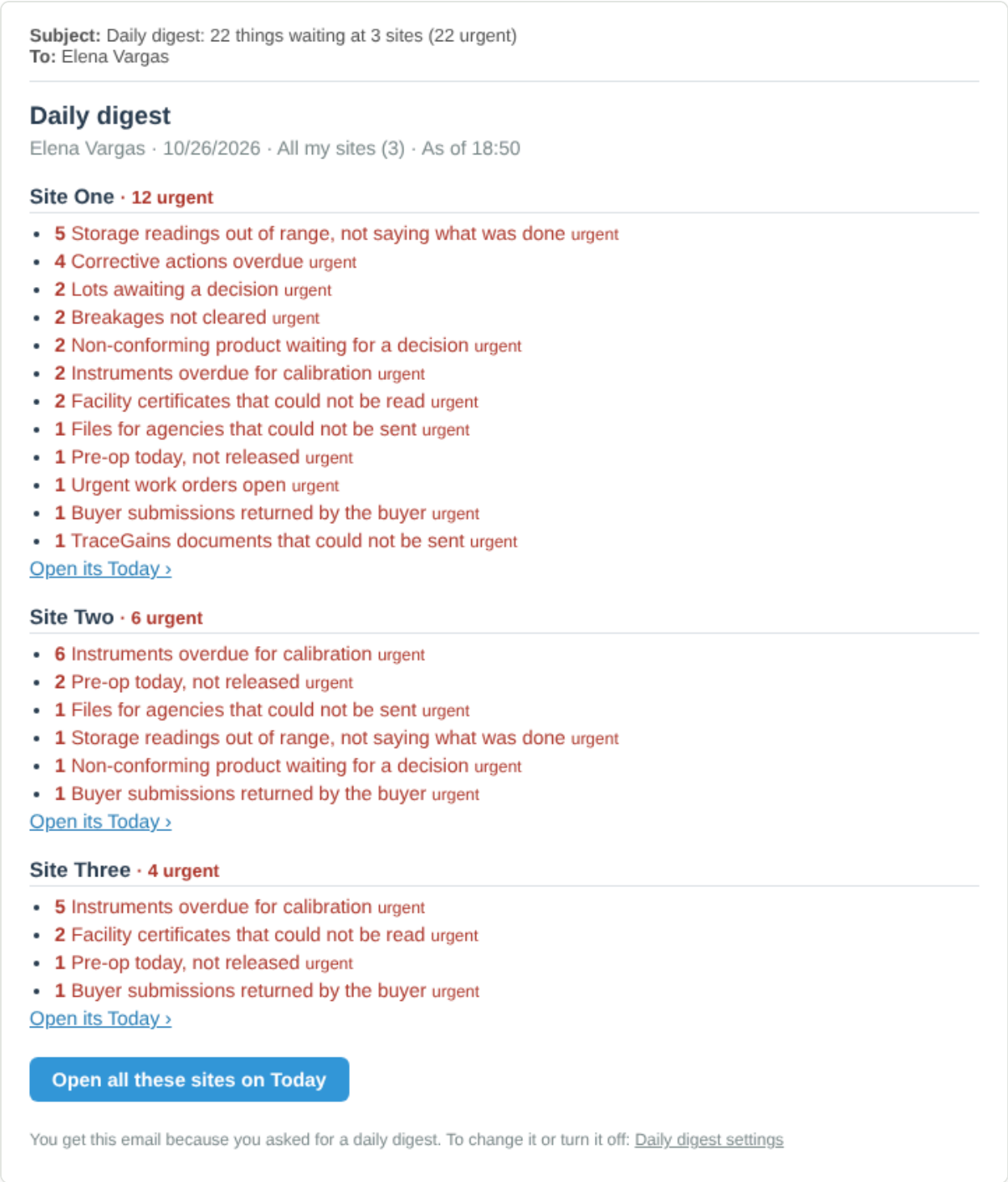
- Sites with nothing waiting are left out: N sites with nothing waiting are left out.

- The page shows the first 30 sites: And N more sites (all of them are in the email).
- A site whose figures haven't been counted yet: N sites have not been counted yet.
- Open all these sites on Today › opens Today with the sites the digest covers.

> **Note:** The figures are those the server counts for every site every 15 minutes, as on Today's All my sites, so they can be a little old; Today shows each site as it is now.

THE EMAIL

Every hour, the server sends the digests whose hour it is (or up to two hours late, if a run was missed), once a day, in each person's language, from the email account of the first of their sites that has one. The subject says how much is waiting, such as Daily digest: 53 things waiting at 3 sites (22 urgent), or Daily digest: nothing waiting at your sites when it is sent every day. The email lists each site with something waiting and its lines, urgent ones marked urgent, with Open its Today › under each site, then the button Open all these sites on Today, and a link to the Daily digest settings to change it or turn it off.



Subject: Daily digest: 22 things waiting at 3 sites (22 urgent)
To: Elena Vargas

Daily digest

Elena Vargas · 10/26/2026 · All my sites (3) · As of 18:50

Site One · 12 urgent

- **5** Storage readings out of range, not saying what was done urgent
- **4** Corrective actions overdue urgent
- **2** Lots awaiting a decision urgent
- **2** Breakages not cleared urgent
- **2** Non-conforming product waiting for a decision urgent
- **2** Instruments overdue for calibration urgent
- **2** Facility certificates that could not be read urgent
- **1** Files for agencies that could not be sent urgent
- **1** Pre-op today, not released urgent
- **1** Urgent work orders open urgent
- **1** Buyer submissions returned by the buyer urgent
- **1** TraceGains documents that could not be sent urgent

Open its Today ›

Site Two · 6 urgent

- **6** Instruments overdue for calibration urgent
- **2** Pre-op today, not released urgent
- **1** Files for agencies that could not be sent urgent
- **1** Storage readings out of range, not saying what was done urgent
- **1** Non-conforming product waiting for a decision urgent
- **1** Buyer submissions returned by the buyer urgent

Open its Today ›

Site Three · 4 urgent

- **5** Instruments overdue for calibration urgent
- **2** Facility certificates that could not be read urgent
- **1** Pre-op today, not released urgent
- **1** Buyer submissions returned by the buyer urgent

Open its Today ›

Open all these sites on Today

You get this email because you asked for a daily digest. To change it or turn it off: Daily digest settings

A daily digest with only the urgent things

- With Yes, when something is waiting, no email goes on a day with nothing waiting at your sites (or nothing urgent, with Only urgent things).
- An email lists up to 200 sites, then N more sites have things waiting: open all of them on Today. A note says when some figures could not be counted: Some

figures could not be counted: open Today for the latest.

- No digest goes to an account that is inactive, locked or expired, or without a valid email address; nor when none of the person's sites has an email account (Verify / Modify Email Configuration, 3.2 of the user manual).
- The email's links use the address you last saved the page from; Continuum support can set the address for everyone.

6.70 Shipments

Lots > Shipments records a customer's shipment of many lots at once: the customer, the ship date, the order and the bill of lading, and the lots with their cases. The lots are checked together against the customer's spec (see 6.24), and only those outside it need a reason. Each lot found is then recorded as going to the customer, as on Customer Specifications, and gets its Traceability shipping event (see 6.61). Shipments are scanned or pasted on the page, made by releasing a load (see 6.44), or imported from the shipping system's file. Lots > Lots for an order finds the lots that meet a customer's spec, to pick them for an order.

Who	What they do
Everyone with the Customer Specifications permission	See the shipments, the Exceptions, the Settings and Lots for an order.
Quality Control Managers, at their sites, and system administrators	Record, import and void shipments, give the reasons for lots outside the spec, make the missing Traceability events, import customers and change the settings.
Those who inspect loads (see 6.44)	Release loads, which records their shipments.

Note: Shipments and Lots for an order go with the Customer Specifications permission: they have none of their own. Growers don't see them. A shipment is recorded at one site; the list and the Exceptions can show several sites, with the site choice of the overview pages (see 6.68).

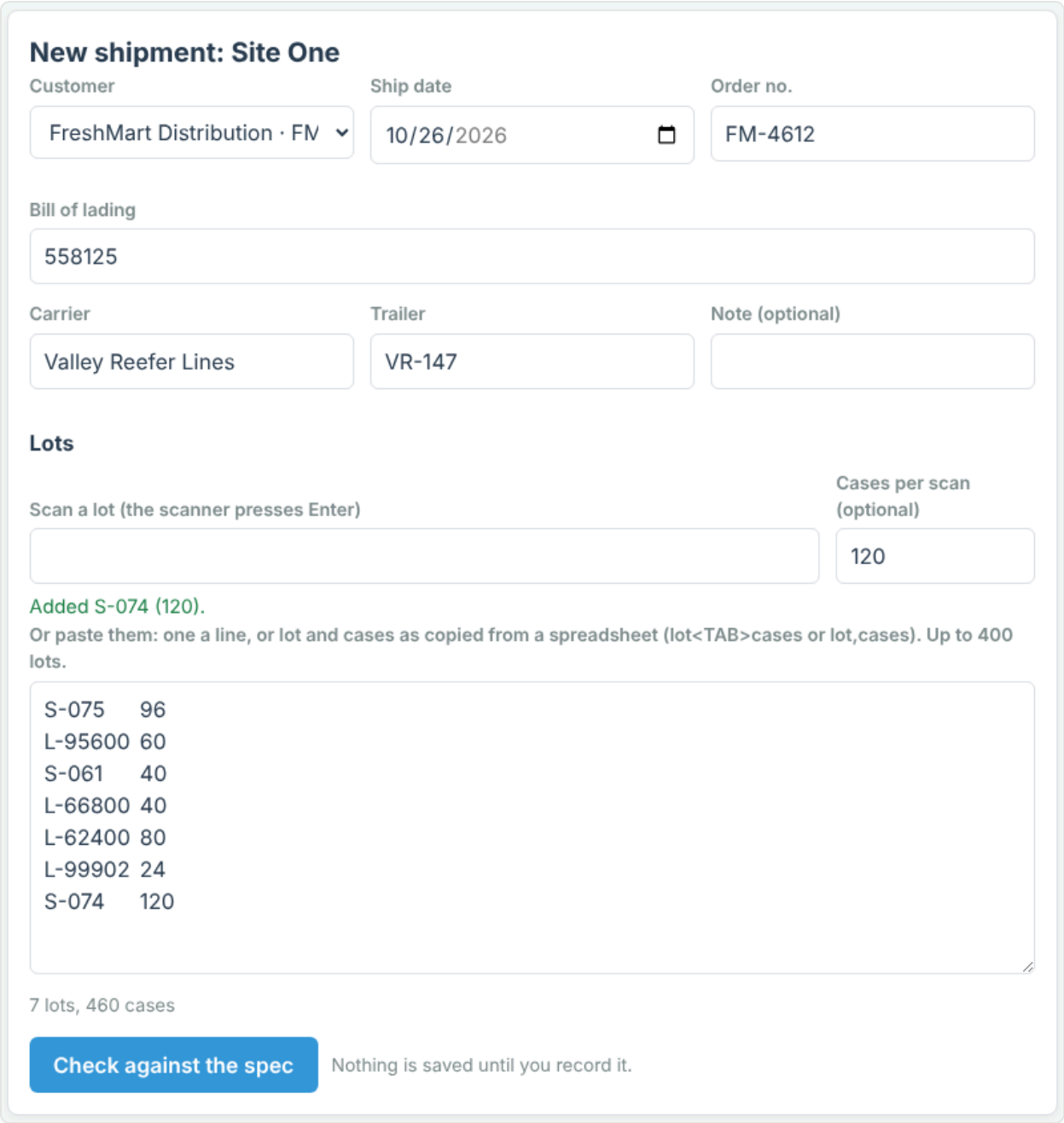
THE SHIPMENTS LIST

The Shipments tab, where the page opens, lists the shipments of the days chosen (the site's today to start with), 50 a page. Choose the Sites, the days Shipped from and to (at most 92), a Customer, where they came From (Entered by hand, Released load or Imported from a file) and what to Show (All recorded, With lots outside the spec, Needing a reason or Voided), or search an order, a bill of lading, the start of a lot number or a shipment number (S-000123); then select Show. Each row has the shipment's number (S-000001, numbered at each site), the ship date, the customer, the order and bill of lading, the Lots found (6 of 7), those Outside spec and those that Need a reason, where it came From (opening the load or the file) and how many of its lots have their Traceability event. The totals are above the list.

NEW SHIPMENT

Quality Control Managers record a shipment on the New shipment tab, at one site (with several in the site choice, choose the Site and select Open):

1. Choose the Customer, one of the site's customers on Customer Specifications (with more than 300, type part of its name or code).
2. Check the Ship date (the site's today; at most 60 days back and 30 ahead) and type the Order no., the Bill of lading, the Carrier, the Trailer and, if you want, a Note.
3. With the cursor in Scan a lot (the scanner presses Enter), scan each lot label or pallet tag: each scan adds the lot to the box below, with the Cases per scan (optional) if you typed them. Or paste the lots into the box, one a line, or the lot and its cases as copied from two columns of a spreadsheet.
4. Select Check against the spec. Nothing is saved yet.



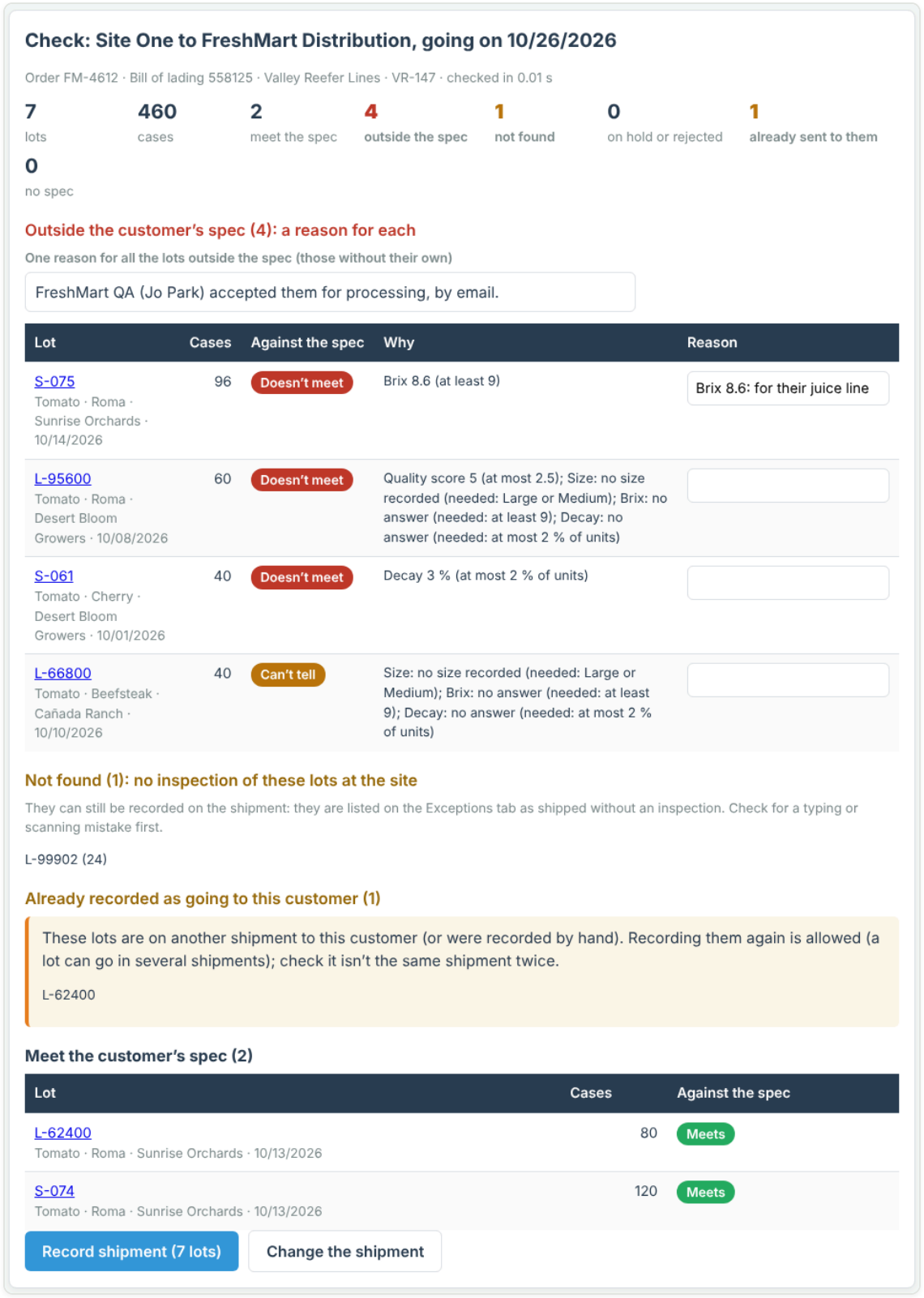
A new shipment, its lots pasted and scanned

A lot is its lot number as inspected at the site (upper or lower case alike; its latest inspection), or its inspection's serial number. Scanned again, a lot adds its cases (S-071: 120 cases added (now 240).) or isn't added twice (S-071 is already on the shipment (line 1). Not added again.); the scanner's Enter never sends the form. A shipment has at most 400 lots.

The check shows each lot against the customer's spec in force on its inspection date (see How a Lot Is Checked in 6.24), with the counts at the top, and lists first

what needs a look:

- Outside the customer’s spec (Doesn’t meet or Can’t tell): each lot with why, and a Reason box. Give each lot a reason, or type One reason for all the lots outside the spec (those without their own), such as the customer’s agreement.
- Not found: no inspection of these lots at the site, a typing or scanning mistake, or lots shipped without being inspected. They can still be recorded, and are listed on Exceptions.
- On hold or rejected on Lot Disposition (see 6.7), and Already recorded as going to this customer (on another shipment or by hand): make sure they really go, and that it isn’t the same shipment twice.
- Then the lots that Meet the customer’s spec, and those for which The customer has no spec in force.



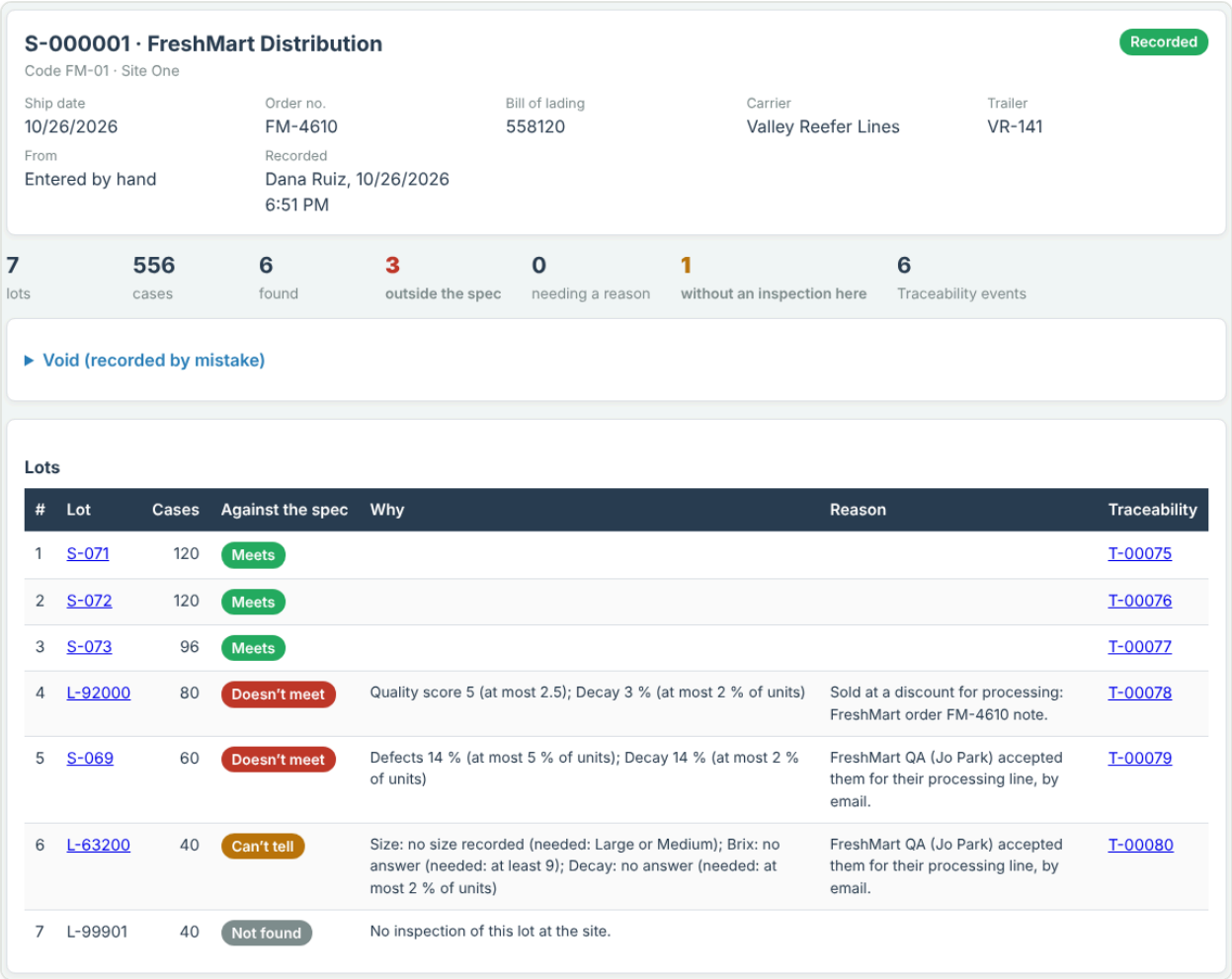
The check, before the shipment is recorded

Select Record shipment (7 lots), or Change the shipment to go back to the form. Without a reason for every lot outside the spec nothing is saved (Nothing was

saved: 3 lots outside the customer’s spec have no reason. Give each one a reason, or one reason for all of them.). Once recorded, the shipment opens (Shipment recorded. Each lot found is recorded as going to the customer.), with how many Traceability shipping events were made. Each lot found is on Customer Specifications as going to the customer, with the check as it was then and its reason, as a lot recorded there by hand; lots not found stay on the shipment only. The same shipment sent twice within a few seconds is recorded once.

A SHIPMENT

A shipment’s number opens it: its details, where it came From (Entered by hand, a Released load or Imported from a file, opening the load or the import), who recorded it, its figures, and its Lots, each with its cases, how it stood Against the spec and why, its Reason (or Needs a reason, in red) and its Traceability event (None yet, or None (no cases)). A lot opens its page on Customer Specifications; History is at the bottom.



A shipment entered by hand

Quality Control Managers have, above the lots:

- Give a reason, when lots outside the spec have none (as only shipments from a load or a file can): type Why they went anyway and select Give the reason.
- Make the missing Traceability events, then Make the events (see Traceability Shipping Events, below).
- Void (recorded by mistake): type Why it is voided and select Void the shipment. Its lots are no longer recorded as going to the customer, and their Traceability shipping events are voided too, with the same reason. The shipment is kept, marked Voided; Show Voided on the list finds it.

> **Note:** A shipment can’t be changed: void one recorded by mistake and record it again. A single lot recorded by mistake is removed on its page in Customer Specifications with Remove (recorded by mistake) (see 6.24).

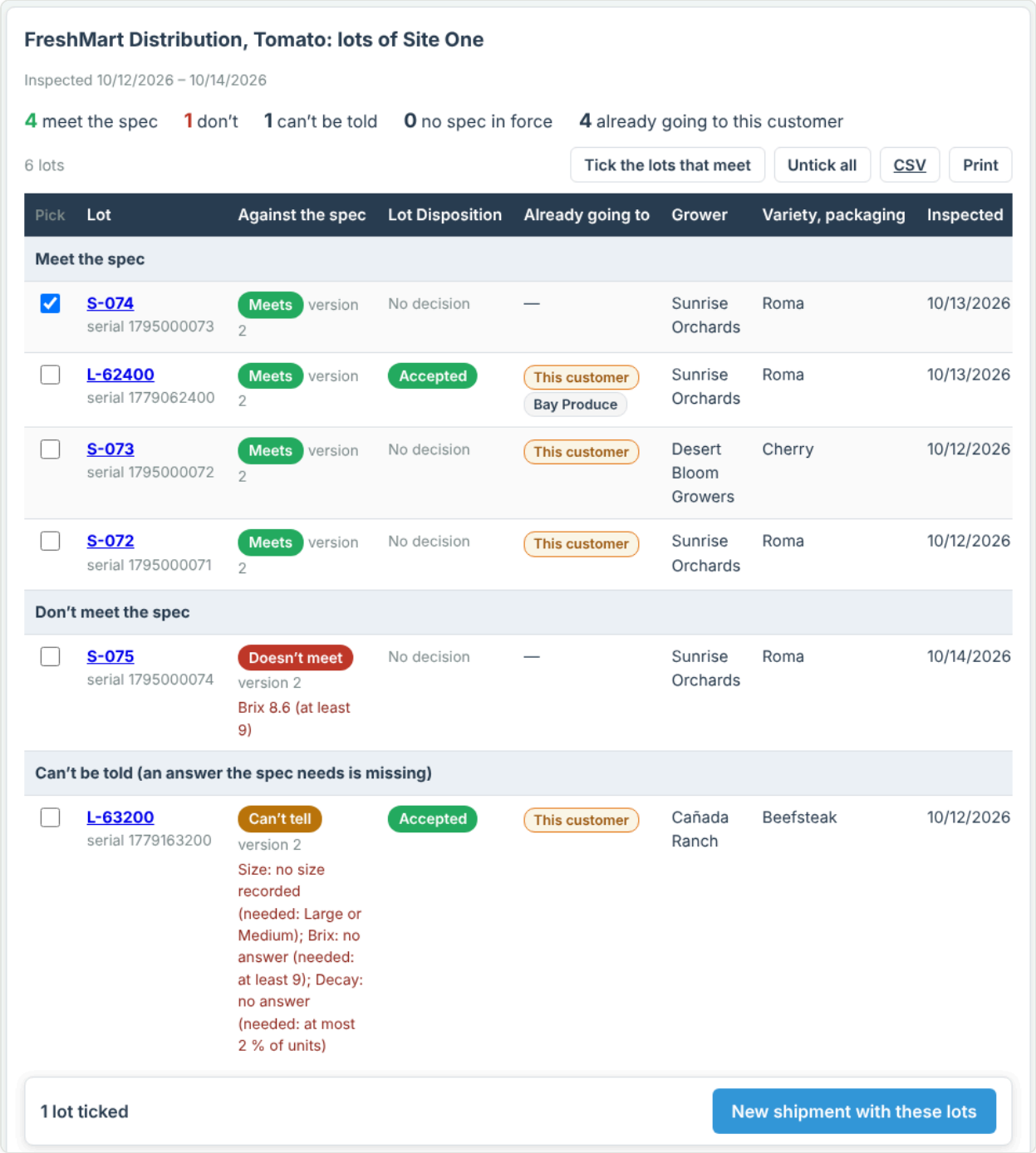
SHIPMENTS FROM RELEASED LOADS

Releasing a load on Load Inspections records its lots as a shipment to the load’s customer, dated the load’s day, with its order, carrier, trailer and cases and the load’s number as its note. A lot outside the spec without a reason doesn’t stop the release: it is recorded needing one. Cancelling the load voids the shipment. A load whose customer isn’t on Customer Specifications is released as before and listed on Exceptions until the customer is added and a Quality Control Manager selects Record now on the load (see 6.44).

LOTS FOR AN ORDER

Lots > Lots for an order shows, for a customer’s order of a commodity, which lots inspected in the last days meet the customer’s spec. Choose the Site, the Customer and the Commodity (one the customer has a spec for), and check Inspected from and To (the last 3 days to start with, at most 14). Lots on hold, rejected or dumped are left out unless you tick Show the lots on hold, rejected or dumped too.

The lots that meet the spec come first, then those that don’t (with why), those that can’t be told and those with no spec, each checked against the version in force on its inspection date, with its decision on Lot Disposition and the customers it is Already going to. Up to 2,000 lots are listed; CSV downloads them and Print prints them.



Lots for an order, with a lot picked

Quality Control Managers tick the lots for the order, or select Tick the lots that meet (those not on hold and not yet going to this customer, up to 400), then New shipment with these lots: the New shipment tab opens with the customer and the lots, to check and record (see New Shipment, above).

IMPORTING SHIPMENTS FROM THE SHIPPING SYSTEM'S FILE

Shipments can come from the shipping or ERP system: a file with one row for each lot on a shipment. Quality Control Managers select Import shipments from a file on Shipments:

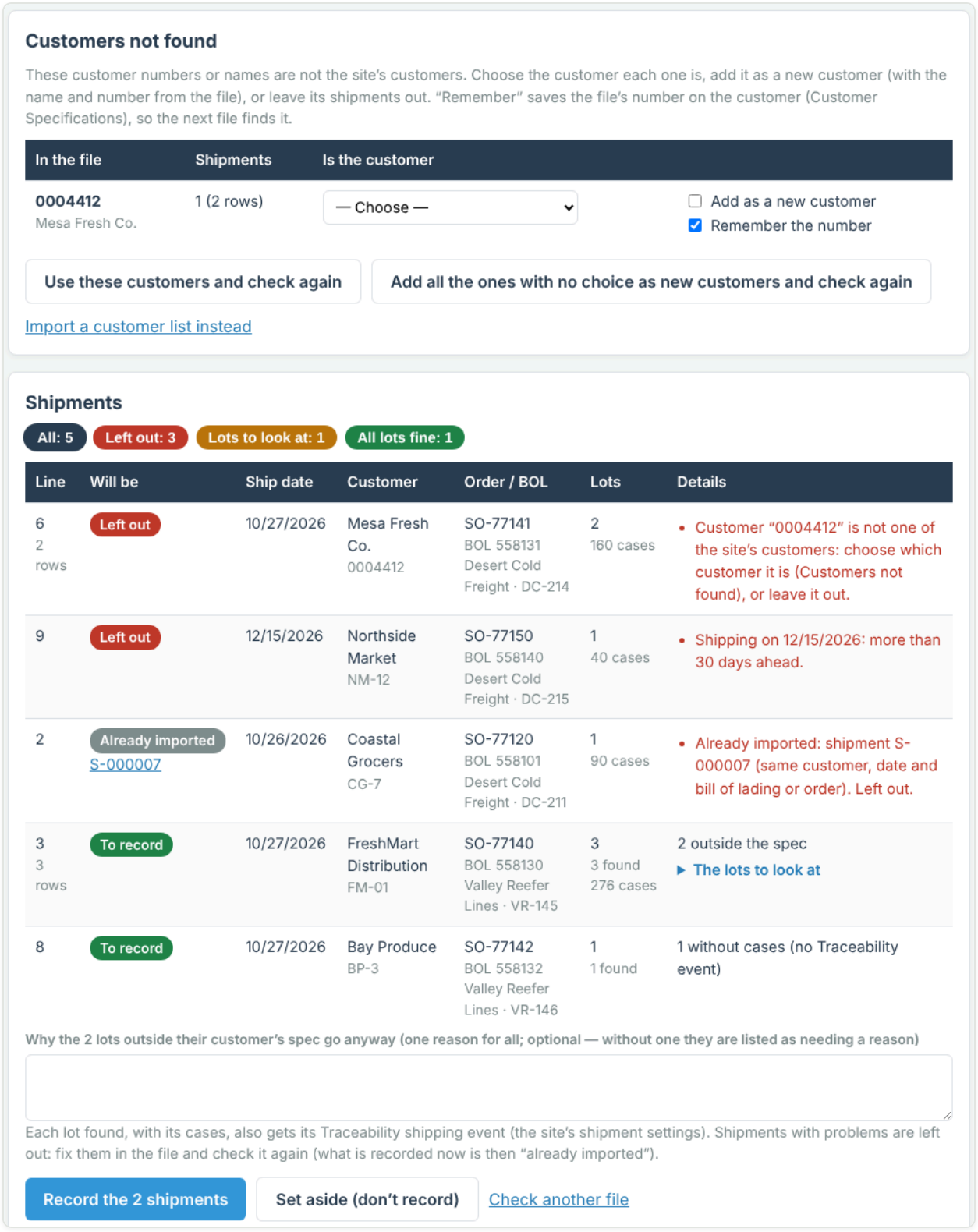
1. Export the shipments from your system, or fill in a Template (English headings or Spanish headings), and save the file as CSV (in Excel: File > Save As > CSV UTF-8). Rows with the same ship date, customer and bill of lading (else order number) are one shipment.
2. Choose the Site and the File, and under Dates such as 03/04/2026 are, Month/day (March 4) or Day/month (3 April).
3. Select Check the file. Nothing is recorded yet.

The columns are found by their headings, in English or Spanish, or by the names shipping systems usually give them (Cust No, Ship To Name, BOL #, Pallet Tag, Qty Shipped...). A file has up to 20,000 rows; the page shows the largest file the server accepts (at most 10 MB).

Column	What goes in it
Ship date	Required: Y-m-d, m/d/Y or d/m/Y, or an Excel date; at most 60 days back and 30 ahead.
Customer #	The customer's Code on Customer Specifications (with or without leading zeros), found first.
Customer	Or its name. One of the two customer columns is required.
Order no., BOL	Optional: the order, and the bill of lading, the reference of the Traceability events.
Carrier, Trailer, Note	Optional.
Lot	Required: the lot number (or pallet tag) as inspected at the site, or the inspection's number.
Cases	Optional, a whole number; the lot's Traceability event needs it.

The check shows the file’s shipments and lots, those to record and those left out, notes on its rows, and below:

- Columns: which column holds each field, and how dates are read. Change them and select Check again with these columns; the choice is kept for the site’s next file.
- Customers not found: for each customer number or name that isn’t the site’s, choose which customer it Is, tick Add as a new customer, or choose Leave these shipments out; Remember the number saves the file’s number as the code of a customer without one, so the next file finds it. Then select Use these customers and check again.
- Shipments: each shipment, the problems first, with what Will be done (To record, Left out or Already imported) and its details.



The shipping system's file, checked

A shipment is left out when its customer isn't found or no longer active, its date can't be read or is out of range, it has no lots or more than 400, or it was Already

imported (a shipment of an earlier file with the same customer, date and bill of lading, else order). Fix the file and check it again: what was recorded is then already imported, so nothing is recorded twice.

To record the shipments without problems, type if you want one reason for the lots outside their customer's spec (without one they are recorded needing a reason), and select Record the 2 shipments. A large file takes a minute or two, and finishes even if you leave the page. The outcome of each shipment is then shown, with its number. Set aside (don't record) closes a file not wanted. Files lists the site's files and where each stands; a file whose recording stopped part way stays waiting, and applying it again records only the rest.

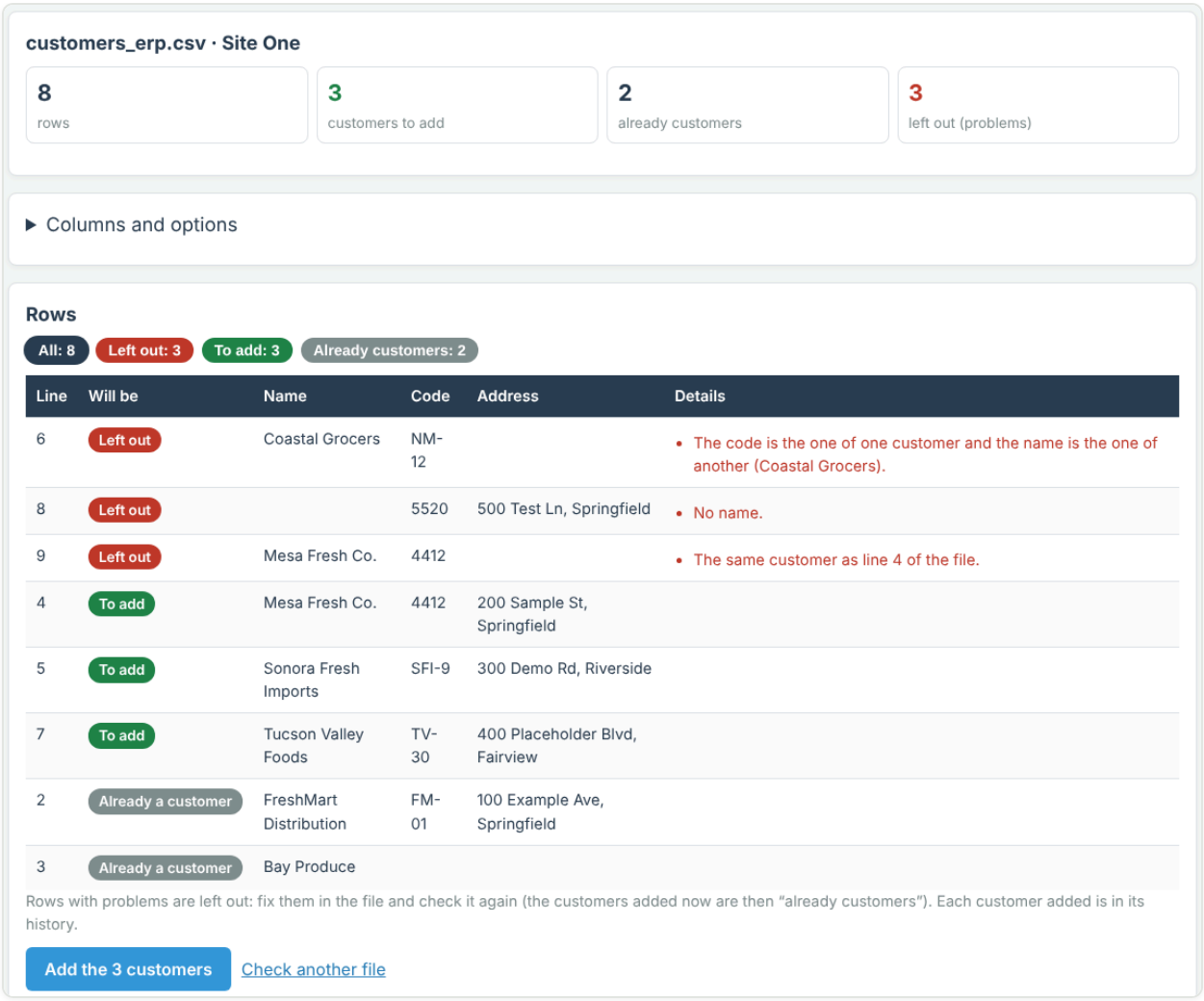
> **Tip:** Continuum support can set the same import to run each night on the server, from the folder where your shipping system leaves its file: the file is checked and, if you ask, its shipments without problems are recorded; otherwise it waits under Files.

IMPORTING CUSTOMERS

Shipments need their customers on Customer Specifications. A long customer list is imported instead of typed: Quality Control Managers select Import customers on the Customer Specifications list, or Import them from a file beside Add customer.

1. Save the list as CSV, one row a customer: the Name (required), the Code (its number in your system, by which the shipment import finds it), the Address and a Note.
2. Choose the Site and the File; tick Fill in the empty code, address and note of customers already there to complete them from the file.
3. Select Check the file, look at each row, and select Add the 3 customers.

A row is matched with the site's customers by its code, else by its name, and is To add, To fill in, Already a customer, or Left out, with why (No name.; The same customer as line 4 of the file....). Nothing is changed until you add; each customer added is in its history on Customer Specifications.



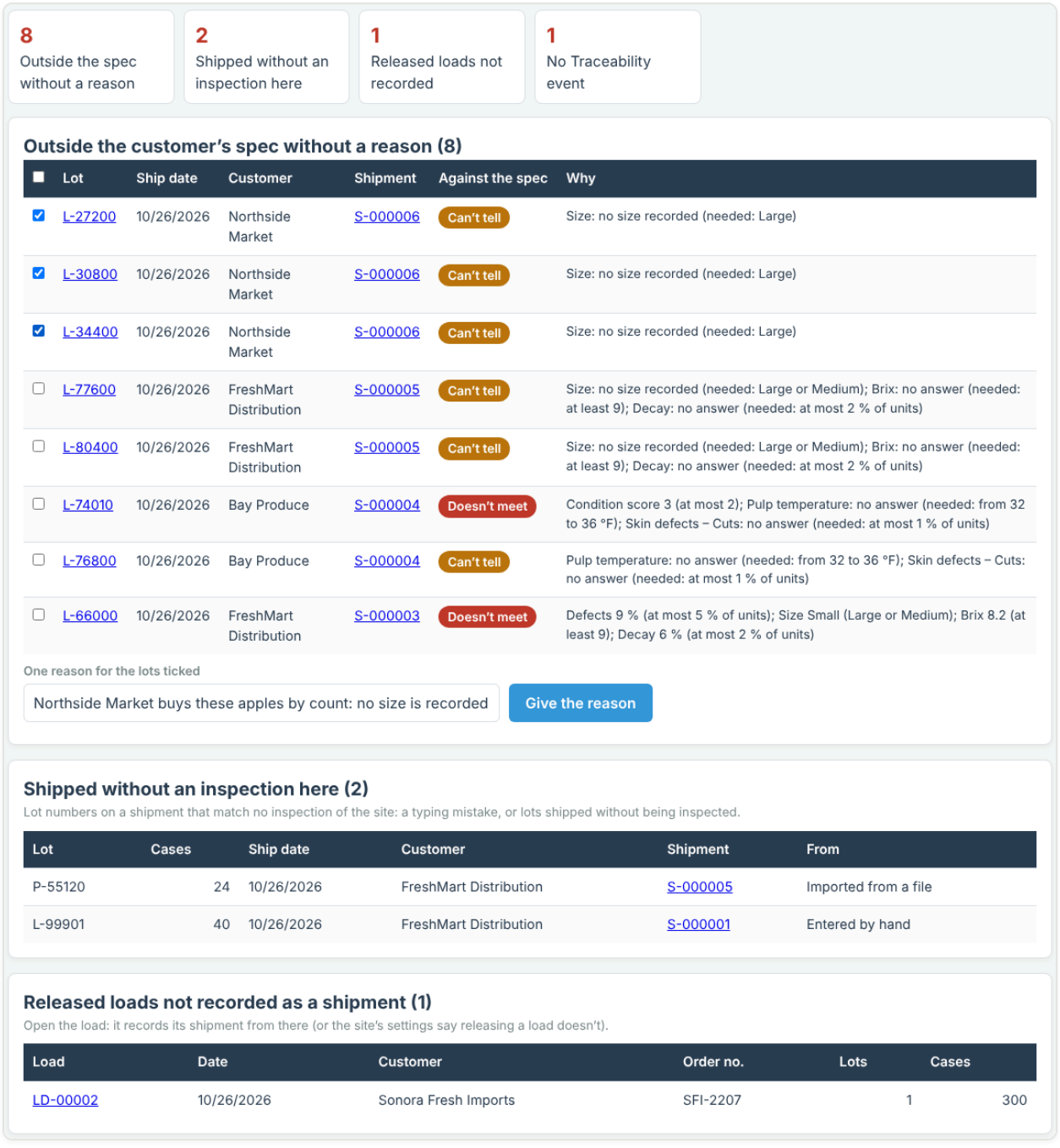
A customer list checked before it is added

EXCEPTIONS

The Exceptions tab gathers what still needs looking at for the lots shipped on the days chosen (the last 7 to start with) at the Sites chosen, a box for each list:

- Outside the customer's spec without a reason: tick the lots, type One reason for the lots ticked and select Give the reason (Quality Control Managers).
- Shipped without an inspection here: lot numbers that match no inspection of the site.
- Released loads not recorded as a shipment: open the load to record them (see 6.44).
- Lots sent without their Traceability shipping event: tick them and select Make the Traceability events for the ticked.

- Traceability shipping events still in force for voided records, when there are any (records voided before their events were voided with them): Quality Control Managers tick the events, type Why the events ticked are voided and select Void the events ticked (1 Traceability shipping event voided., or No event needed voiding any more.; without a reason, Nothing was saved: say why the events are voided.), or open one to correct it in Traceability.
- Customers most often sent lots outside their spec, with their share.



Exceptions, with a reason about to be given to three lots

> **Note:** Today shows the first three lists for the last 7 days (see 6.60), and each lot shipped outside a customer's spec is reported on Trend Alerts for 14 days, as one recorded by hand (see 6.24).

TRACEABILITY SHIPPING EVENTS

With Traceability Events in use (see 6.61), recording a shipment makes the shipping event of each lot found that has cases: the ship date, the lot number as the traceability lot code, the product of its inspection, the cases as the quantity, the customer as Shipped to, and the bill of lading (else the order number) as the reference; the event says made from a shipment. A lot without cases gets none.

A shipment dated after tomorrow gets its events later: The shipment goes after tomorrow: its lots' Traceability shipping events are made by themselves the day before it goes. They are made each morning, on the server, once the lots go tomorrow or sooner, and the shipment's History says they were made by themselves; an event someone voided is never made again. Where the site's settings don't make the events, select Make the missing Traceability events from the day before the lots go. Voiding a shipment, cancelling its load or removing a lot on Customer Specifications voids the lot's event too.

SETTINGS

Settings, for one site, are changed by Quality Control Managers: Releasing a load on Load Inspections records its lots as a shipment to the load's customer, and Make each lot's Traceability shipping event when a shipment is recorded (lots with cases), both on to start with; the Unit of the quantity shipped (cases) and the Reference document of the shipping events (Bill of lading), which the events made from shipments take instead of those of Traceability's settings. Select Save settings.

- Customer Specifications (6.24) shows each lot of a shipment as going to the customer, with the shipment's number and cases; a lot sent to the same customer on several shipments counts once in the figures there and in Management Review (6.20) and Quality Objectives (6.27).

- Quality Certificates (6.25) are issued for the lots of shipments, one for each shipment of a lot; Mock Recalls (6.28) and Recalls (6.39) trace a lot to the customers of its shipments.

6.71 From the FS App

Packing house > From the FS App shows what the Food Safety app (the FS app) sends from the floor of a site with QA. The FS app, Continuum's Food Safety app for tablets and phones, records the floor records of eight QA modules in 15 logs: pre-op inspections and cleaning, glass and brittle plastic checks and breakages, metal detector checks and foreign material, wash water checks and water changes, environmental swabs, visitors, repair requests, the work done, the hygiene clearance and planned maintenance, and instrument checks; and, at a site that follows CanadaGAP, three logs more: agronomic inputs, pest monitoring and training sign-ins (see CanadaGAP Logs, below). Each run an inspector finishes becomes a record in its module, as if the inspector had recorded it on the module's page: the module's rules and history apply, and the record counts on Today, Trend Alerts and the Audit Pack like any other. This page lists the runs that couldn't become records, with why, to try again once the setup is fixed or to dismiss, and every run of the last 7 days. It is in the Packing house menu, after Calibration Records.

Who	What they do
Inspectors: Users with Mobile App User? set to Yes	Sign in to the FS app with their Continuum QC user name and password, and send the runs. They don't need this page.
Quality Control Managers	See the runs of their sites with QA, try a run again or dismiss it, and keep the lists of who records each module's checks.
Users with the From the FS App permission	See the runs of their site, try a run again or dismiss it.

> **Note:** Continuum support installs the FS app's part on the server for the company; until then the page says The Food Safety app is not set up for this company yet. Give Users the From the FS App permission on gear > Users > Add / Change User Permissions; they see it after they next sign in. Quality Control Managers have it already; growers don't have it.

GETTING A SITE READY FOR THE APP

The FS app connects to your Continuum QC address, and what it offers comes from each module's setup at the site: nothing is copied, so there is nothing to keep in step. Before the inspectors start:

- Who signs in: Users with Mobile App User? set to Yes on Add / Change Users (see 3.3 of the user manual), active and not locked, at an active site, with their Continuum QC user name and password. Quality Control Managers, system administrators and growers can't sign in to the FS app. Every inspector sees all the logs of the site.
- The tablet is registered on the device list as for the QC app, and a tablet with both apps counts once (see 3.4 of the user manual).
- A log is offered once its module has something in it: Pre-op inspection for each sanitation area with a checklist, Cleaning done for each cleaning task, Glass & brittle check for each area with items, Glass or brittle breakage for each area, Metal detector check and Foreign material found for each detector, Wash water check and Water changed for each wash point, Environmental swabs for each swab point, Visitor sign-in, Repair request, Repair done for each open work order, Hygiene clearance for each work order waiting for it, Planned maintenance for each planned task, and Instrument check for each instrument in use.
- Where each one is listed: under the Location and Area its row picked on its module's page, otherwise as the module names it. When the site has Locations and Areas, every form starts with Location and Area, two drop-down lists the inspector must answer (see 6.72).
- Something added or changed on the website, such as a detector or a work order, reaches the tablet at its next download (a sync).

The modules' lists of who may record apply in the app as on the website. Tick the inspectors who use the app in each of these, in the module's Settings; the lists offer the Users with the module's permission, so give them the permission first (see 3.3 of the user manual):

- Pre-op inspection: Who does the pre-op checks and verifies cleaning, besides the QC Managers, in Sanitation (see 6.41).
- Metal detector check and Foreign material found: Who checks the detectors, besides the QC Managers, in Metal Detection (see 6.46).
- Wash water check and Water changed: Who checks the wash water, besides the QC Managers, in Wash Water (see 6.43).
- Hygiene clearance: Who gives the hygiene clearance, besides the QC Managers, in Maintenance (see 6.50).

A run by anyone else waits on this page, Not recorded. The other logs have no such list.

WHAT EACH LOG BECOMES

Each finished run of an area becomes one record, dated with the day and time of the run and made as the inspector who sent it: the module shows the inspector as who did it.

Log in the app	Module	What it becomes
Pre-op inspection	Sanitation (6.41)	The area's pre-op check of its day: each item Yes (passed), No (failed, with what was found) or N/A, and the ATP readings in RLU. A run of today starts the check if there is none yet; while the check is failing, the run is its check again.
Cleaning done	Sanitation (6.41)	The task's cleaning of the period, done on the day of the run, to verify on the website. Answered No: nothing is recorded.
Glass & brittle check	Glass and Brittle Plastics (6.48)	An area check: each item intact, or damaged, missing or no longer there, with what is wrong and the action taken.

Log in the app	Module	What it becomes
Glass or brittle breakage	Glass and Brittle Plastics (6.48)	A breakage, with the product exposed, its lots and what was done with it; and its cleanup when Cleaned up by is answered.
Metal detector check	Metal Detection (6.46)	A check with each test piece and the reject device. When the detector's last check failed (up to 14 days back), the run is its test again.
Foreign material found	Metal Detection (6.46)	Foreign material found by the detector: what, its size, the lot and what was done.
Wash water check	Wash Water (6.43)	A check with its readings and what it was read with. When the wash point's last reading was out of range (up to 14 days back), the run is its reading again.
Water changed	Wash Water (6.43)	A water change. Answered No: nothing is recorded.
Environmental swabs	Environmental Monitoring (6.40)	For each test swabbed, the point's swab to take (a re-swab or a swab around a positive first, then the routine swab of the period), or else an extra swab; an ATP reading is its result at once. A test answered not swabbed skips the routine swab to take, with why. Up to 30 days back.
Visitor sign-in	Visitors and Contractors (6.51)	A visit, with the health questions, the escort and the rules agreed to; the app's check-out signs the person out.
Repair request	Maintenance (6.50)	A work order, with its area, equipment, what is wrong, whether it is a food contact surface, and its priority.
Repair done	Maintenance (6.50)	The work done on an open work order: who, by a contractor or not, what was done, and a temporary repair with its date.

Log in the app	Module	What it becomes
Hygiene clearance	Maintenance (6.50)	The clearance of a work order waiting for it: cleared when the three checks are Yes, otherwise sent back with what is wrong.
Planned maintenance	Maintenance (6.50)	The planned task done, with who did it. Answered No: nothing is recorded.
Instrument check	Calibration Records (6.12)	A calibration of the instrument: the method, the reference values and readings, the result, whether it was adjusted, and a note.
Agronomic input (CanadaGAP H1, H2)	Agronomic Inputs (6.77)	An application waiting for verification, from the FS app.
Pest monitoring (CanadaGAP M)	Pest Program (6.80)	A monitoring round of the building: each device's findings, species and action taken, and an area checked without a device.
Training sign-in (CanadaGAP K)	CanadaGAP Forms (6.76)	The trainee's sign-in, with their signature, for Form K.

The records are made as soon as the app says the run is finished. A run cut short, with no new answer for 10 minutes, is made then, by a job that runs every minute on the server. A failed item, a reading out of range or a test piece not rejected with nothing typed about it is recorded with the note Not given in the FS app. Photos taken in the app go to the record's files where the module keeps them (pre-op checks, breakages, wash water checks and instrument checks); every photo and signature also stays with the run on this page.

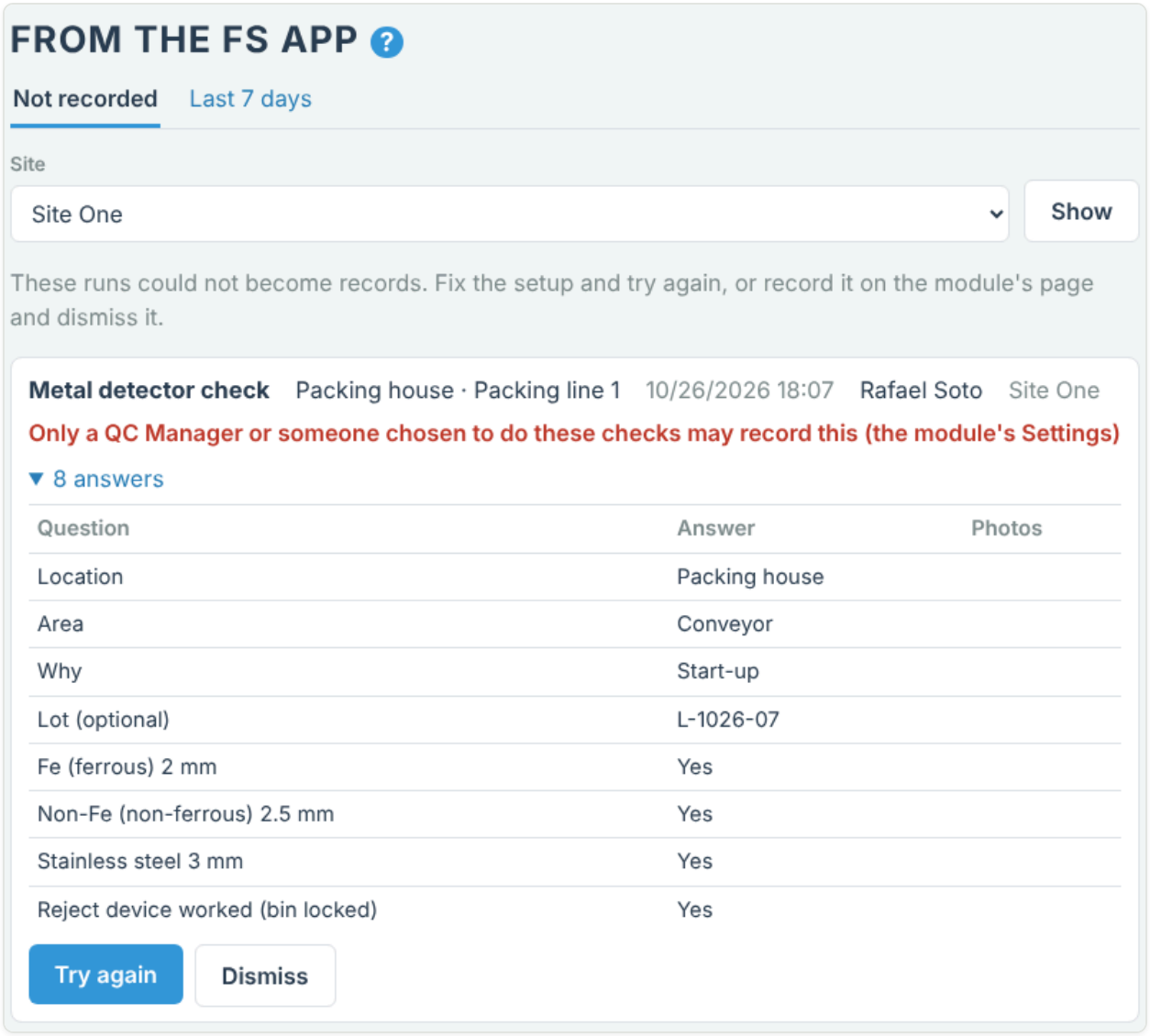
Notes typed in the app's corrective action box are emailed at once to the site's Quality Control Managers who have an email address, each in their own language, in one email for the run, also when the run couldn't be recorded. Its subject reads like Site One: corrective action noted in the FS app (Metal detector check), and it lists where, the question, the answer, the note and when. It goes out once, through the site's email account (see 3.2 of the user manual).

> **Note:** A record made from the app is changed on its module's page, like any other. A run the app sends again with other answers after its record was made never changes the record: it is listed here as Sent again with other answers after its record was made.

RUNS NOT RECORDED

Not recorded, where the page opens, lists the runs that couldn't become records, newest first, and the runs still waiting 25 minutes after their last answer.

1. Go to Packing house > From the FS App.
2. With more than one site, choose the Site, or All my sites, and select Show.
3. Read each run: the log, where the app listed it (its location and area), the day and time (with the time out of a visit), the inspector and, with several sites, the site; and in red, why it wasn't recorded. A run whose place has left the app's lists since (a work order already cleared, a location taken off) is headed A place no longer in the app's lists.
4. Read its answers, under the count of answers (open to start with): each Question with its Answer as the inspector chose it, the note typed with it, and links to its Photos and to a signature. The Location and Area answers show by name, also after a place is renamed or no longer used.



A run not recorded: the inspector isn't on Metal Detection's list

The heading says where the app listed the run (here the detector, listed under Packing house as Packing line 1); the Location and Area answers say what the inspector chose at the top of the form. Why a run wasn't recorded, and what to do:

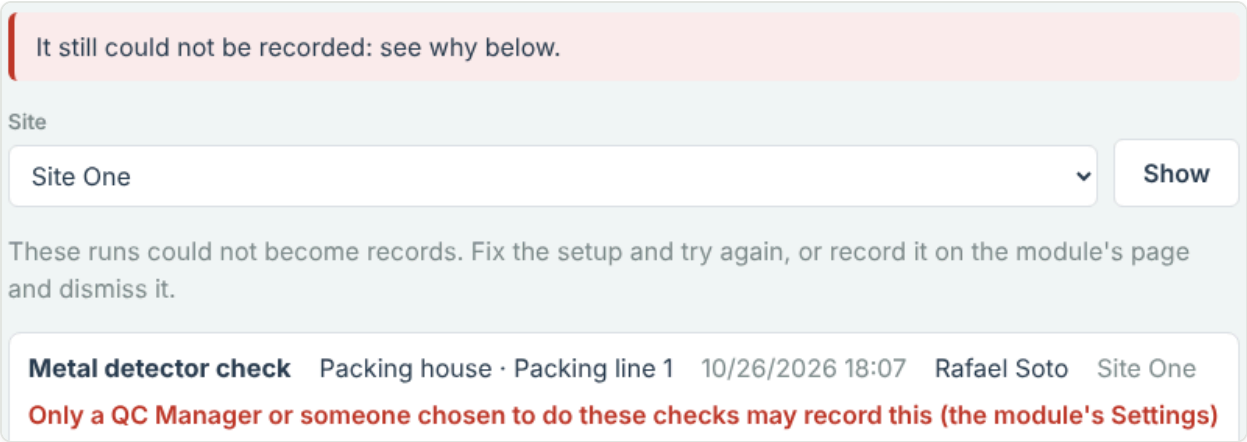
Why (as the page says it)	What to do
Only a QC Manager or a pre-op verifier of the site may record this (Sanitation, Settings)	Tick the inspector in Sanitation's Settings (see Getting a Site Ready for the App), then Try again.

Why (as the page says it)	What to do
Only a QC Manager or someone chosen to do these checks may record this (the module's Settings)	Tick the inspector in Metal Detection's or Wash Water's Settings, then Try again.
Only a QC Manager or a clearer of the site may do this	A hygiene clearance by someone not on Maintenance's list: tick the inspector in Maintenance's Settings, then Try again.
Not every item was answered	Record the check on the module's page with every item, then Dismiss.
The area, item, detector, point or instrument is no longer in use	It was stopped on its module's page, or the tablet still had old forms. Use it again and Try again, or record it on the page and Dismiss; sync the tablet.
Already recorded or released on the website	Nothing to do: Dismiss.
No pre-op check that day (not a production day): record it on the website	Record it on Sanitation, then Dismiss.
Too old to record (the module takes up to 14 days back)	It can no longer be recorded: keep a note of it elsewhere if your program needs one, then Dismiss.
The date or time is not accepted (in the future, or too old)	Check the tablet's date and time; record it on the module's page, then Dismiss.
A reading or answer is not valid	Record it on the module's page with the right values, then Dismiss.
Nothing due for that task in that period	The cleaning was already recorded or skipped: Dismiss.

Why (as the page says it)	What to do
The visitor sign-in is not complete (name, type, rules, health answers or escort)	Sign the person in on Visitors and Contractors, then Dismiss.
Signed in on an earlier day with no sign-out time: enter the visit on the website	Sign the person in on Visitors and Contractors with the Time out, then Dismiss.
The visit is recorded, but its check-out could not be: sign the visitor out on Visitors and Contractors, then dismiss this	As it says.
The form is not known (sent by an older form)	Sync the tablet; record it on the module's page, then Dismiss.
It could not be recorded (see the server log)	Try again; if it stays, ask Continuum support.
Sent again with other answers after its record was made	Compare the answers with the record on the module's page and correct the record there if needed, then Dismiss (there is no Try again).
Not made into a record yet: the job on the server that makes them may not be running (ask Continuum support). Try again makes it now.	Try again; if runs keep waiting, ask Continuum support to check the job on the server.

TRYING AGAIN AND DISMISSING

- Try again, under the run, makes its record now, after what was wrong is fixed (the inspector ticked on the module's list, the area used again...). The page says The run was recorded., or It still could not be recorded: see why below.
- Dismiss is for a run recorded by hand on the module's page, or not needed. The page says Dismissed. Its answers are kept.



Try again on a run whose inspector is still not on the list

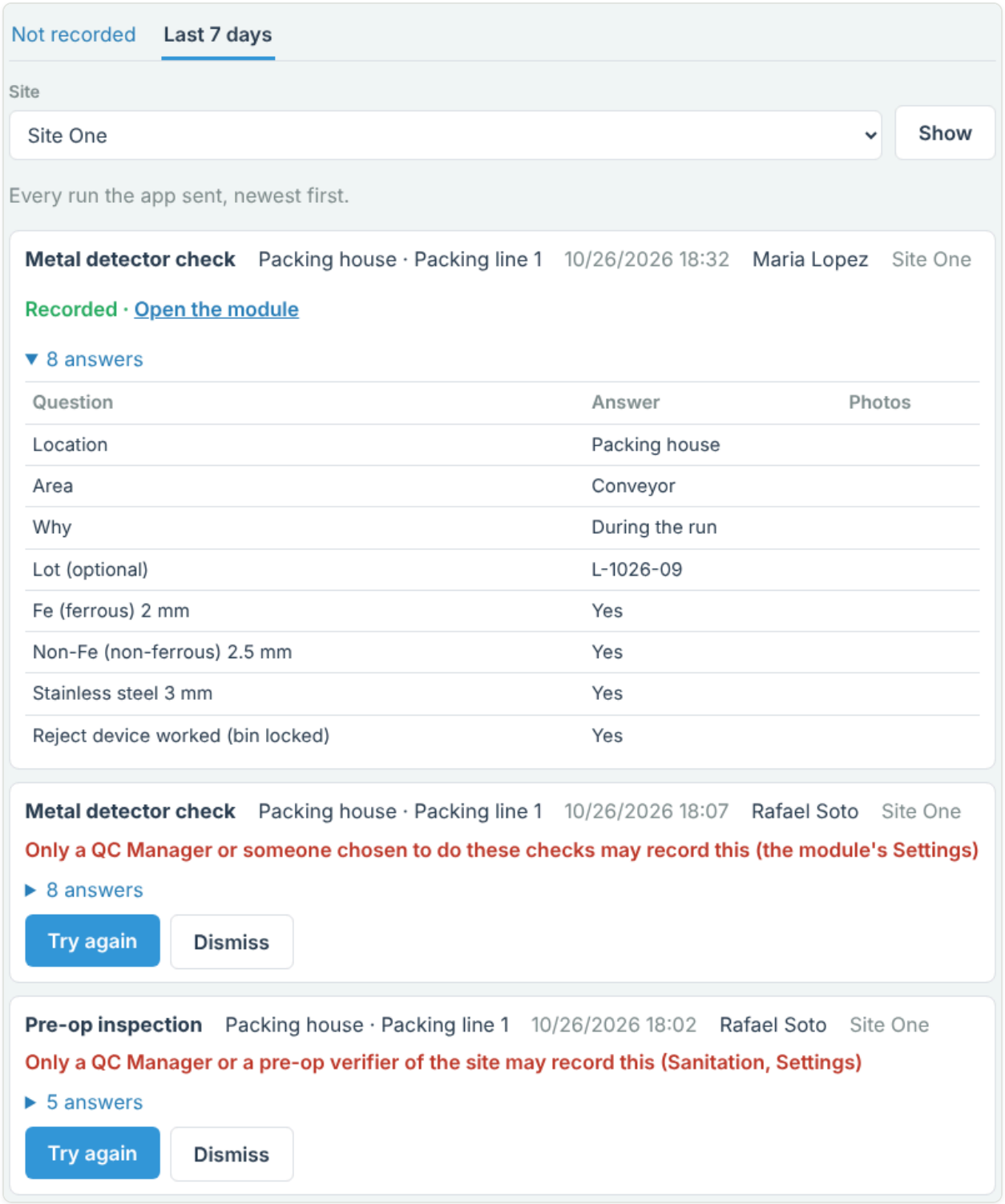
Every answer, photo and signature is kept, whether the run was recorded or dismissed. A run already recorded is never recorded twice, so Try again never makes a second record; a run of several swabs keeps the swabs it already recorded. A run that couldn't be recorded and that the app sends again is made again, whole. If the page says That run was not found., the run was handled meanwhile.

THE LAST 7 DAYS

Last 7 days lists every run the app sent in the last 7 days, newest first (at most 500), each with where it stands:

- Recorded, with Open the module, which opens the module's page at the site.
- Recorded · nothing to record (answered No), for a cleaning, a water change or a planned task answered as not done.
- In red, why it wasn't recorded, with Try again and Dismiss; Dismissed; or Waiting for the run to finish.

Select the count of answers to open a run's answers. A run whose record was made stays Recorded here, also when the app sends it again with other answers: those are listed on Not recorded, as Sent again with other answers after its record was made, with Dismiss only.



The last 7 days: one run recorded, two not

> **Tip:** Open the module goes to the module's page, where the record is with the inspector's name: check there the first records an inspector sends from a new tablet.

CANADAGAP LOGS

While the site follows CanadaGAP (see 6.74), the app also offers three logs, in the CanadaGAP group:

- Agronomic input (CanadaGAP H1, H2): listed under each grower and production site. The inspector answers What was applied, the product from the library (or Other, typed with its PCP #), the actual quantity, the rate and the area treated, the method, whether the label directions were followed, the weather, the equipment and the applicator, and signs. The application is recorded waiting for verification (see 6.77).
- Pest monitoring (CanadaGAP M): listed under each building with devices, under Monitoring: each device's findings, species and action taken, an area checked without a device, and the person responsible. A finding needs the action taken (see 6.80).
- Training sign-in (CanadaGAP K): listed under Training, one area per course and Other topic. The trainee chooses their name (or types it), how they work (Casual, Contract or Payroll), ticks I attended this training and understood it, and signs. It is shown on Form K (see 6.76).

A run sent after CanadaGAP was turned off for the site isn't recorded: it is listed here with CanadaGAP is off for the site (CanadaGAP Module), to try again once it is turned on, or to dismiss.

The app has no Mexico logs yet: the harvest crew checks and hot-water runs are recorded on their pages (see 6.83 and 6.84), and the CanadaGAP logs aren't offered at a site that follows only Mexico.

6.72 Locations, Areas and Equipment

Packing house > Locations, Areas and Equipment keeps each site's own three lists for the Food Safety app (see 6.71) and Maintenance (see 6.50), each name in English and in Spanish: Locations, where on the site (Receiving, Packing line 1, Cold room 2…); Areas, what is checked there (Conveyor, Sorting table, Floor drains…); and Equipment (Sizer 2, Hydrocooler 1, Forklift 3…). Every form in the app starts with the Location and the Area, two drop-down lists the inspector must answer. On a module's page, each row (a sanitation area, a metal detector, a swab

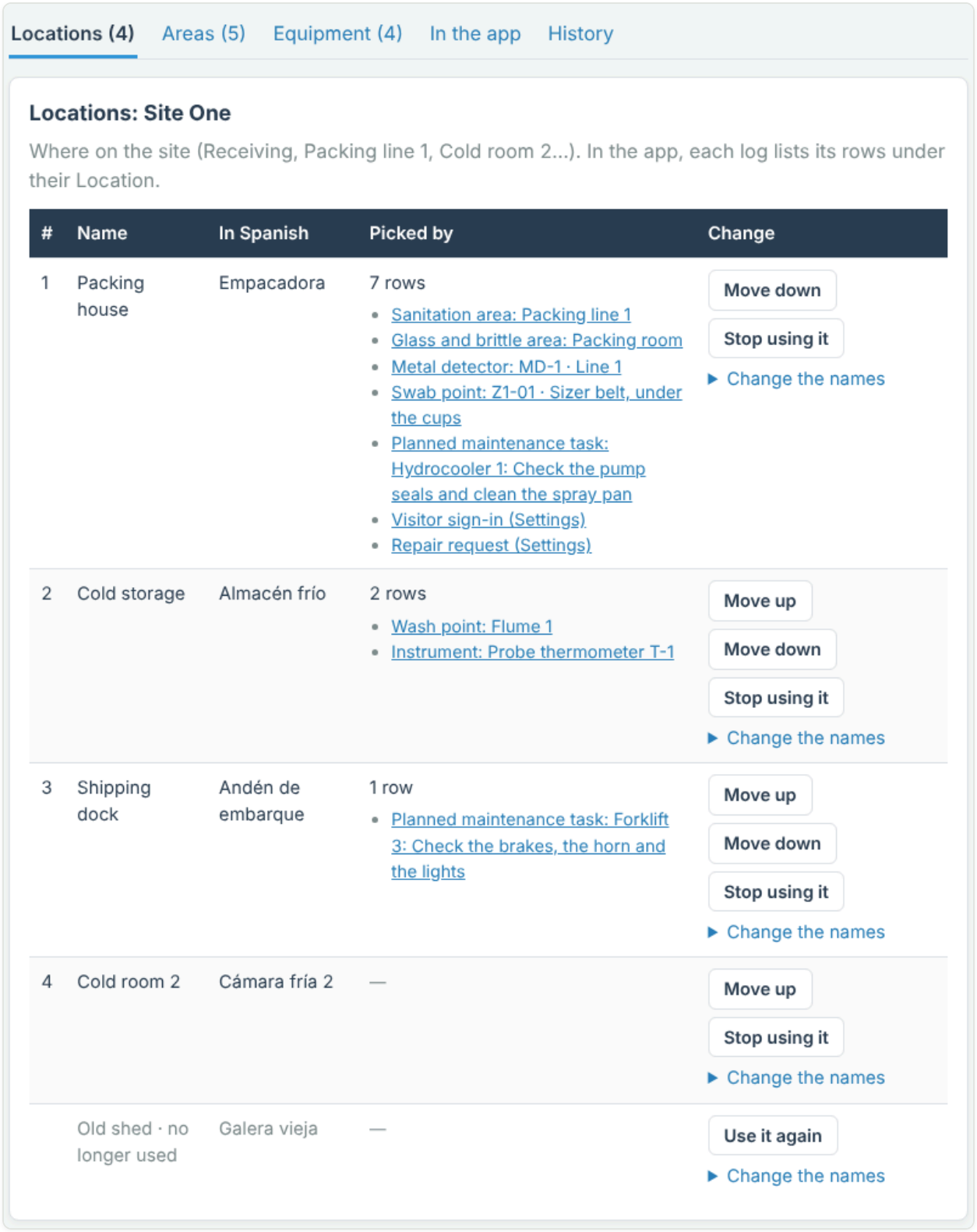
point...) can also pick one Location and one Area: the app then lists the row there, with its own questions. Maintenance's planned tasks and work orders, and the app's repair request, pick their equipment from the Equipment list. It is the last page of the Packing house menu.

Who	What they do
Quality Control Managers	Add to the lists of their sites, change the names and the order, stop using one or use it again; and pick each row's Location and Area on the module pages.
Users with the Locations, Areas and Equipment permission	See the lists of their site, In the app and the History; they change nothing.

> **Note:** Nothing is ever deleted: one no longer used stays on its list, greyed. Until Continuum support installs the page for the company, it says Locations, Areas and Equipment are not set up for this company yet, and the module forms show no drop-downs. Give Users the permission on gear > Users > Add / Change User Permissions; they see it after they next sign in.

THE LISTS

Locations, Areas and Equipment, the first three tabs, each show how many are in use. With more than one site, choose the Site and select Show. Each list shows, in its order: the number, the Name, the name In Spanish, and what Picked by it: for a Location or an Area, how many rows picked it, each a link to its page (the visitor sign-in and the repair request as Settings); for Equipment, how many planned tasks (in use) and work orders name it. The ones no longer used come last, greyed, marked no longer used.



The Locations of a site, and the rows that picked them

Under Change (Quality Control Managers):

- Move up and Move down change the order: the app lists the Locations and Areas in that order.
- Stop using it: it is no longer offered, in the app or in the module forms, and the rows that picked it are listed in the app as before, as if nothing was picked (the page says so). Use it again offers it again.
- Change the names: type the Name in English and the Name in Spanish and select Save. The page says Saved. The app shows it at its next download. A name changed on the Equipment list isn't changed in the planned tasks and work orders that already have it.

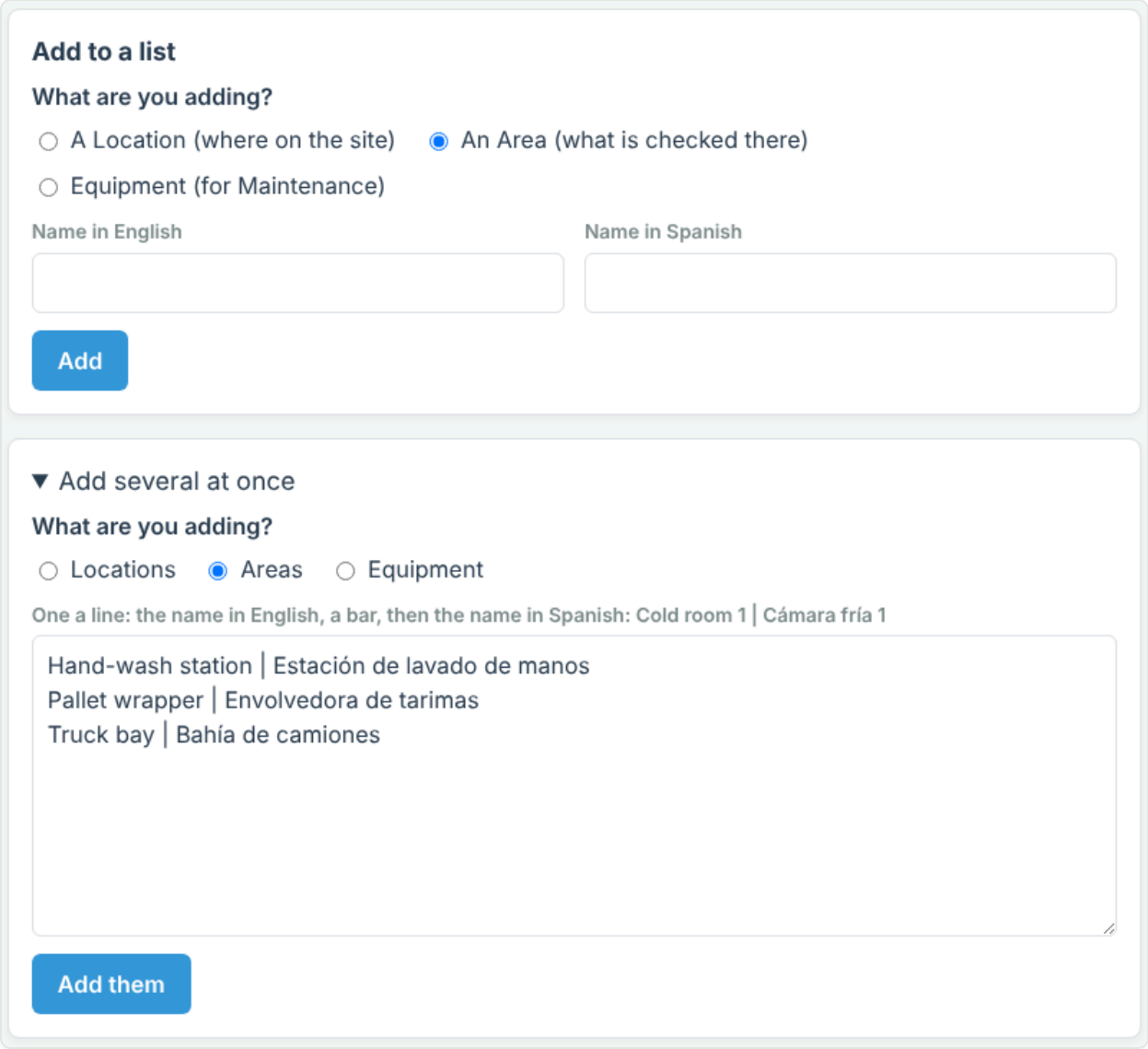
> **Note:** A name is refused when the site already has one of that name on the same list, in any mix of capitals: The site already has a location of that name. (an area, equipment). If someone else changed it meanwhile, nothing is saved: Someone else changed it meanwhile: see it now and try again.

ADDING TO THE LISTS

1. Under Add to a list, choose What are you adding?: A Location (where on the site), An Area (what is checked there) or Equipment (for Maintenance).
2. Type the Name in English and the Name in Spanish: both are needed, each up to 100 characters.
3. Select Add.

To add several at once:

1. Open Add several at once and choose Locations, Areas or Equipment.
2. Type one a line: the name in English, a bar, then the name in Spanish, such as Cold room 1 | Cámara fría 1 (at most 100 lines).
3. Select Add them.



Adding one, or several at once

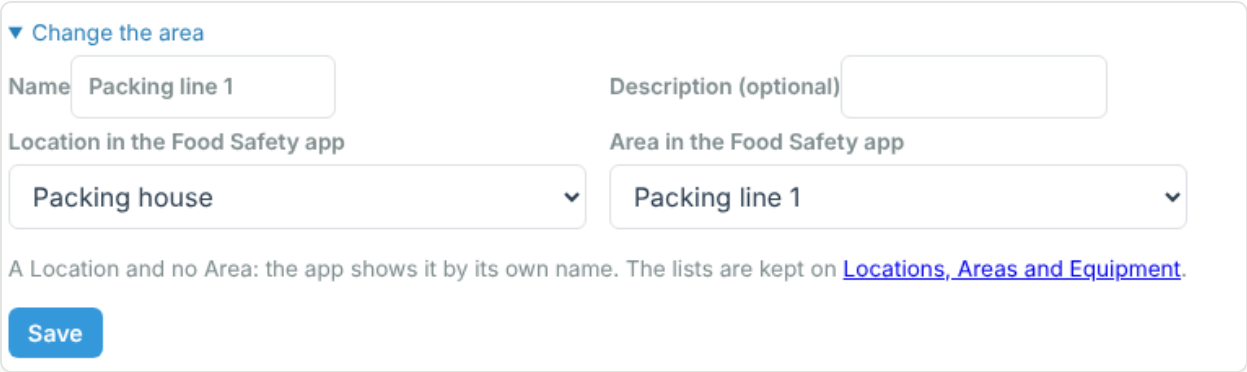
The page says how many were added and how many were already in the list. A line without its Spanish name, or with a name too long, is named on the page with why (Type the name in Spanish.) and isn't added; the others are. A site can have up to 500 of each.

> **Note:** One added before the Spanish name was required shows Missing: add it in Change the names in the In Spanish column.

A ROW'S LOCATION AND AREA

These forms have two drop-down lists, Location in the Food Safety app ((none: as before) to start with) and Area in the Food Safety app ((none)):

- the add and change forms of a sanitation area (see 6.41), a glass and brittle plastic area (see 6.48), a metal detector (see 6.46), a wash point (see 6.43), a swab point (see 6.40), a planned maintenance task (see 6.50) and an instrument (see 6.12);
- the Settings of Visitors and Contractors, under Visitor sign-in in the Food Safety app (see 6.51), and of Maintenance, under Repair request in the Food Safety app (see 6.50).



A sanitation area's Location and Area in the app

Choose them and save the row as usual; a change of the picks alone is saved too. Only places in use are offered; a row whose place is no longer used keeps it, marked no longer used. A site with no Locations or Areas yet shows a link to this page instead. If someone else changed the row's picks after you opened the form, yours aren't saved and the page says someone else changed it first, showing it as it is now. What the app shows:

- A row with a Location and an Area: under that Location, named by the Area, in each of its logs (a detector's check and its foreign material, a wash point's readings and its water change, a glass area's check and its breakage).
- A Location and no Area: under that Location, by the row's own name.
- Nothing picked, or a place no longer used: as the module names it, as before (a sanitation area as the location, with Checklist under it; a swab point under its

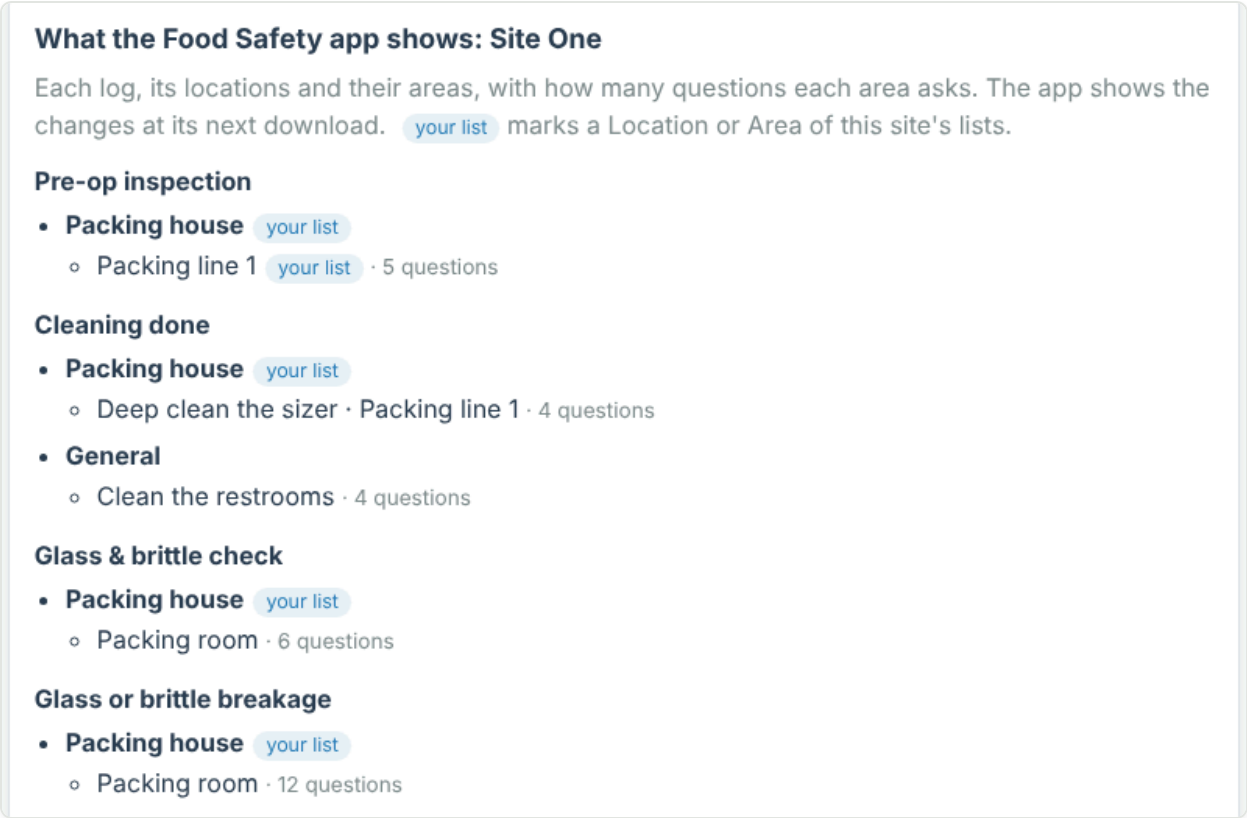
zone; an instrument under its type; the visitor sign-in under Reception; the repair request under Maintenance).

- Cleaning tasks follow their sanitation area's Location, named with their area (Deep clean the sizer · Packing line 1). Two rows that picked the same Location and Area in a log are told apart by their own names. The work orders (Repair done, Hygiene clearance) are listed as before.

> **Note:** The picks change only where the app lists a row: a run becomes the same record in its module whatever Location it was listed under, and a run from a tablet that downloaded its forms before a pick changed is still recorded. Visitors still in are listed for check-out under the sign-in's Location now. Sync the tablets after changing the lists or the picks.

IN THE APP

In the app shows, for each log the app offers at the site, its locations and their areas, with how many questions each area asks (the Location and Area at the top included), as the app will download them; your list marks a Location or an Area of this site's lists. The app shows a change at its next download. A site without any module set up yet has no log.

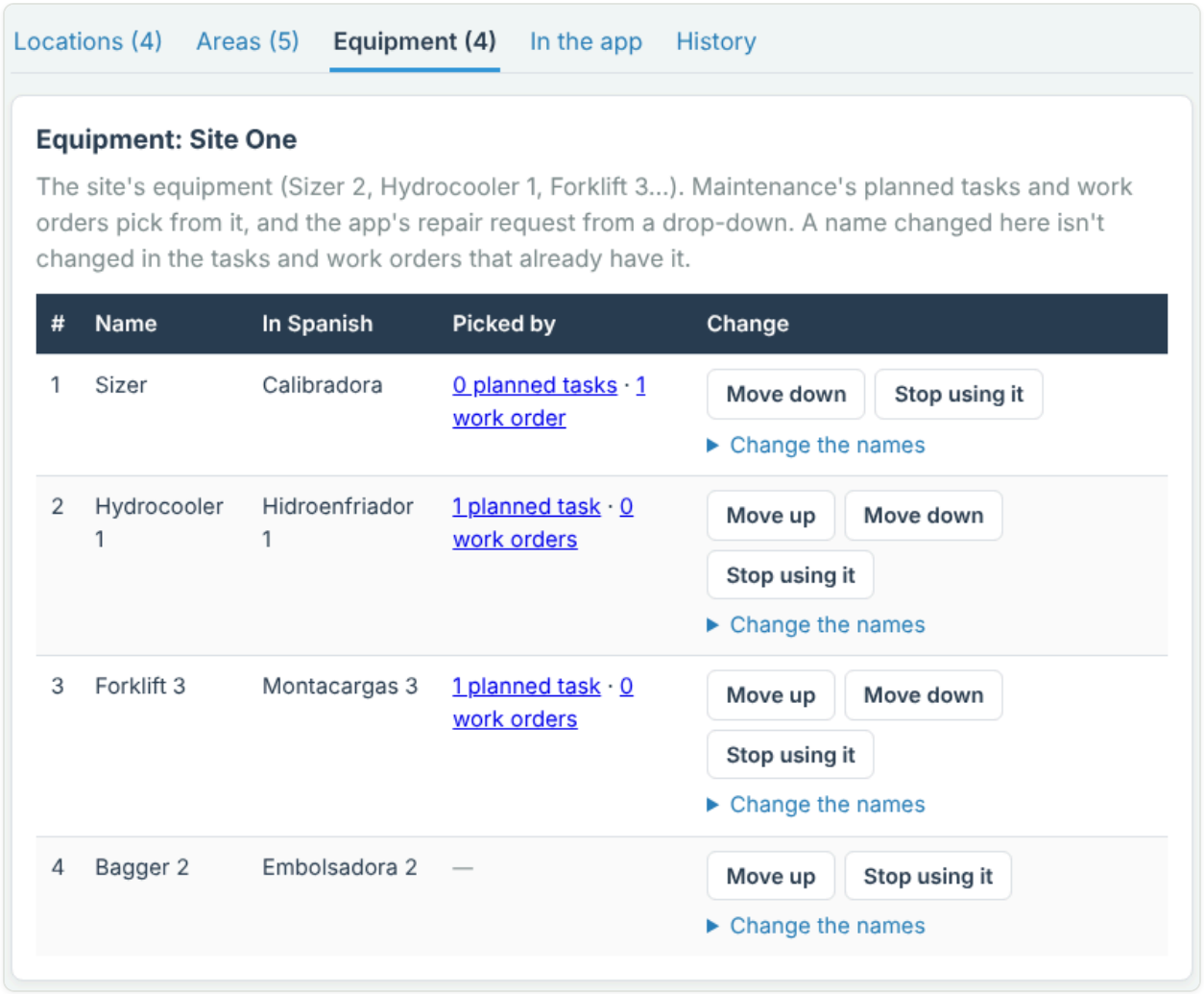


What the Food Safety app shows at a site: the first logs

EQUIPMENT

With equipment on the list, Maintenance's Equipment is a drop-down of it, in the page's language: required for a planned task (Choose…), optional for a work order ((none)). The task or work order keeps the equipment's English name, so its lists, its search and the records are as before. One from before whose equipment isn't on the list keeps it, marked not in the list, until it is changed; anything else is refused with Choose the equipment from the list. A site with no equipment listed types it, as before.

In the app, a repair request's Equipment is a drop-down of the list, with Other (type it below) and Equipment, if Other for one not on it; the work order gets the English name, or what was typed. While the site has Areas, the repair request doesn't ask for its area typed: the work order's area is the Location and Area answered, such as Packing house · Floor drains.



The equipment of a site, and how many tasks and work orders name each

HISTORY, AND ANOTHER SITE'S LISTS

History lists the latest 200 changes at the site, newest first: When, What (Added, Renamed, No longer used, Used again, Moved up, Moved down, or Location · Area picked with the row), the Detail (the names, or the picks before → after) and By whom.

History: Site One

When	What	Detail	By
10/26/2026 6:48 PM	Location · Area picked: Planned maintenance task: Forklift 3: Check the brakes, the horn and the lights	— · — → Shipping dock · —	Dana Ruiz
10/26/2026 6:48 PM	Added: Equipment	Bagger 2 / Embolsadora 2	Dana Ruiz
10/26/2026 6:48 PM	Added: Equipment	Forklift 3 / Montacargas 3	Dana Ruiz
10/26/2026 6:48 PM	Added: Equipment	Hydrocooler 1 / Hidroenfriador 1	Dana Ruiz
10/26/2026 6:48 PM	Added: Area	Floor drains / Drenajes del piso	Dana Ruiz
10/26/2026 6:48 PM	Added: Area	Sorting table / Mesa de selección	Dana Ruiz
10/26/2026 6:48 PM	Added: Area	Conveyor / Banda transportadora	Dana Ruiz
10/26/2026 6:48 PM	Added: Location	Cold room 2 / Cámara fría 2	Dana Ruiz
10/26/2026 6:48 PM	Added: Location	Shipping dock / Andén de embarque	Dana Ruiz

The history of a site's lists

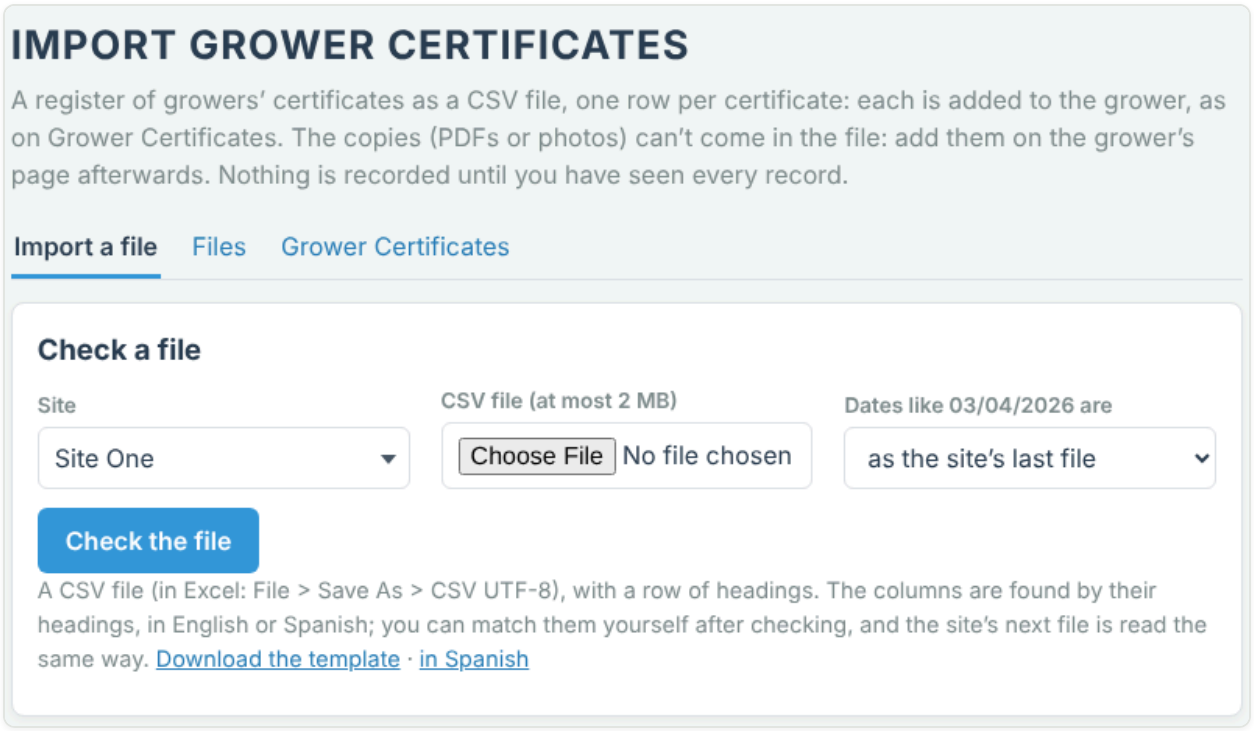
A new site can take another site's lists, with each row's Location and Area, through Copy from another site on QA Setup (see 6.32). QA Setup's checklist shows Locations, Areas and Equipment as To do until the site has one.

6.73 Importing Records from a File

Many records can come in at once from a CSV file: a lab's report, a water or swab lab's results, a temperature recorder's readings, a checkweigher's or metal detector's log or, when the company starts, its certificate register, its supplier and grower lists, its training records, instruments, maintenance plan and document register. Each feature that takes a file has Import from a file on its page, for its

site's Quality Control Managers and the system administrators. The file is checked first, and nothing is recorded until you have seen every record; then the records are recorded as if typed in on the feature's page, with its own checks, history, limits and Trend Alerts.

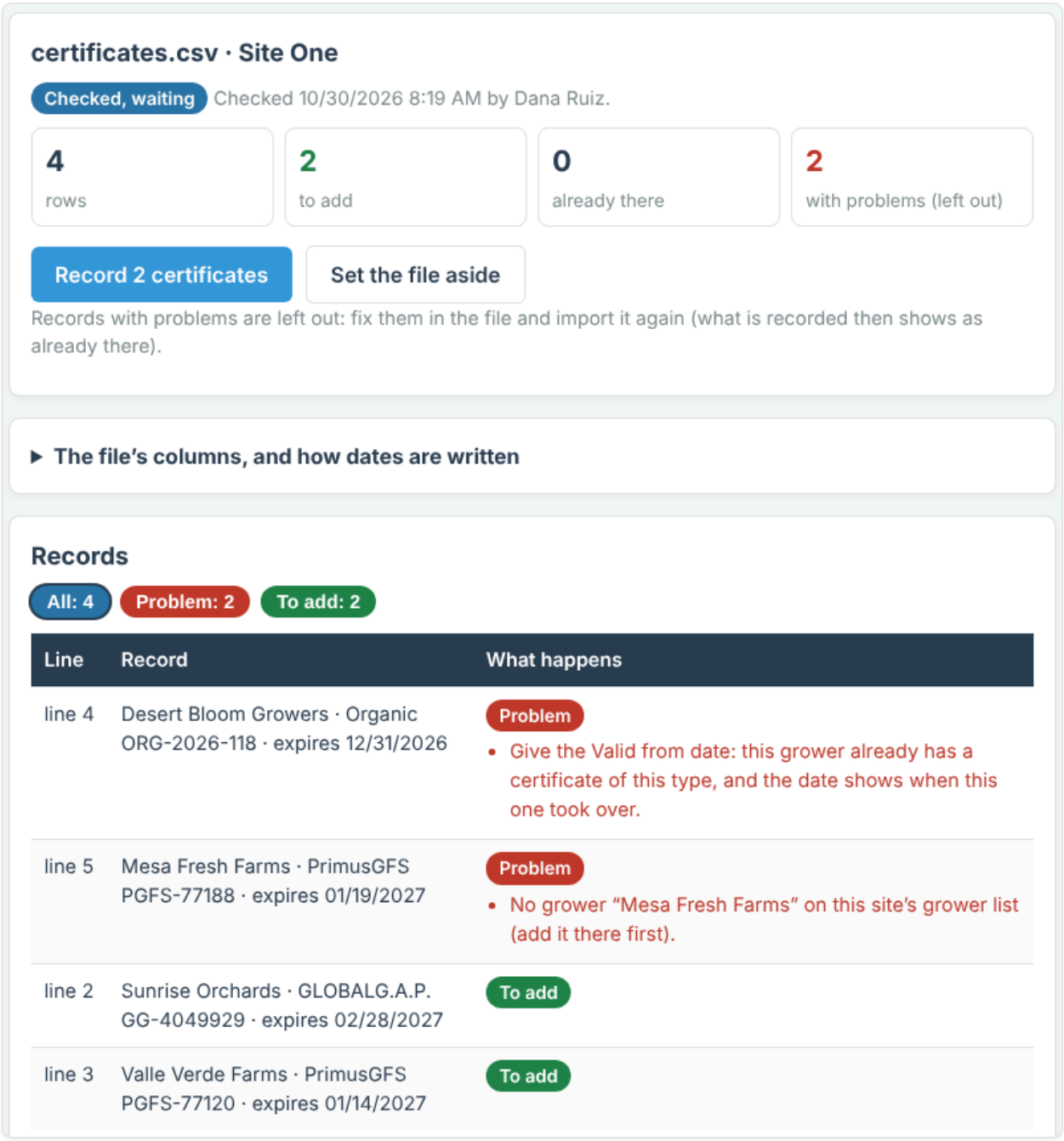
1. On the feature's page, select Import from a file. Its Import page opens for your site; with more than one site, choose the Site.
2. Select Download the template (in your language, or in the other) for the columns, with example rows; the table The columns, below the form, says what each holds and which are required (*).
3. Save your file as CSV (in Excel: File > Save As > CSV UTF-8), choose it under CSV file and select Check the file.
4. Look at the records (the ones with problems are first, each with why and its line in the file), then select Record (for example Record 2 certificates), or Set the file aside.



Import Grower Certificates: a file to check

The check says of each record: To add; Already there (the same record is on file: importing a file again records nothing twice); or Problem, with why (No grower "Mesa Fresh Farms" on this site's grower list (add it there first).). Nothing a file

only names is created: an analyte, a water source, a swab point, a place, a pack, a detector, a course, a worker, a supplier category, a piece of equipment, a grower or a customer must be on its page first. (Two exceptions: a new instrument with its type and how often it is calibrated, and a new business in Traceability's Locations.) Records with problems are left out: fix them in the file and import it again.



A file of grower certificates checked, before recording it

COLUMNS AND DATES

The columns are found by their headings, in English or Spanish, and by the names other systems usually give them (Sample ID, Analyte, Report Date…). When a required column isn’t found (The file has no column for: …), or one was matched wrongly, open The file’s columns, and how dates are written, choose each field’s column and select Check again. The columns chosen are kept for the site’s next file of the same kind. Dates like 03/04/2026 are read month/day or day/month as chosen there or when checking (otherwise as the site’s last file, otherwise as in the site’s country), unless the file’s own dates tell: one that can only be read one way, such as 25/03/2026, decides for the whole file, and the page says so (a file with both kinds isn’t recorded). A date can also be written 2026-03-04, with a time, or as Excel keeps it; a number 0.05 or 0,05.

RECORDING, AND THE FILES

Record checks the file again (anything recorded meanwhile is then already there) and records each record to add: Recorded. Each record’s outcome is below. A record that can’t be recorded is listed under Not recorded, with why, and the file stays waiting: select Record again to retry it (what was recorded is skipped). Files lists the site’s files of that kind: when and by whom each was checked (or The job), its records, and where it stands: Checked, waiting; Partly recorded; Recorded; or Set aside.

WHAT CAN BE IMPORTED

Records (page)	Columns (* required)	A record, and when it is already there
Lab results (Lab Results, 6.38)	Date sampled*, Lab*, Lab reference, Test for, Lot, Commodity, Grower, Sample, Analyte*, Result*, Date reported, Note	A test: the rows with the same lab and lab reference are its results, checked against the site’s limits. Already there: a test with the same lab and lab reference.

Records (page)	Columns (* required)	A record, and when it is already there
Water tests (Water Testing, 6.49)	Water source*, Test*, Date sampled*, Result*, Unit, Date reported, Lab, Lab reference, Taken by, What was done, Note	A result of one of the source's tests (an empty result: a sample waiting for the lab; a waiting sample gets its result). Already there: the same test, day and lab reference.
Environmental monitoring (Environmental Monitoring, 6.40)	Date swabbed*, Swab point*, Zone, Test*, Result*, Date of result, Lab, Lab reference, When, Note	A swab of a point: its scheduled swab when there is one, else an extra swab; a positive is followed up as on the page. Already there: the same point, test, day and lab reference with its result in.
Cold chain readings (Cold Chain, 6.34)	Place*, Date*, Time, Temperature (or Temperature (°F) / Temperature (°C)), Unit, Reference, What was done	A reading of a place (a temperature recorder's download: one row each). Already there: the same place, minute and temperature.
Weight checks (Net Weight Checks, 6.47)	Date*, Time, Pack*, Lot, Line, Check, Gross weight, Net weight, Unit, What was done	A check of a pack: the rows with the same pack and check number that day are its packages. Already there: the same pack, minute, lot, line and packages.
Metal detector checks (Metal Detection, 6.46)	Date*, Time, Detector*, Why, Lot, Fe, Non-Fe, Stainless steel, Reject device worked*, What was done	A check of a detector. Already there: the same detector and minute.

Records (page)	Columns (* required)	A record, and when it is already there
Grower certificates (Grower Certificates, 6.15)	Grower*, Certificate type*, Certificate number, Certification body, Scope, Valid from, Expires*, Note	A certificate of a grower on the site's list, without its copy (added on the grower's page). Already there: the same grower, type and expiry.
Approved suppliers (Approved Suppliers, 6.45)	Supplier*, Category*, Supplies, Contact, Phone, Email, Note, Status, Approval date, Next review, Conditions, Review note	A supplier, and its review when a Status is given (Quality Control Managers only; an approval whose category needs documents waits for them). Already there: the same name.
Approved growers (Approved Growers, 6.21)	Grower*, Status*, Approval date, Next review, Conditions, Based on	A decision about a grower (several rows of a grower: its history, oldest first); Quality Control Managers only. Already there: the same grower, status and day.
Employee training (Employee Training, 6.52)	Worker*, Employee number, Course*, Date trained*, Trainer*, Hours, Language, Passed, Expires, Notes	A session: the rows with the same course, day, trainer, hours and language are its attendees. Already there: the worker attended that course that day.

Records (page)	Columns (* required)	A record, and when it is already there
Calibration records (Calibration Records, 6.12)	Instrument*, Instrument ID, Type, Location, Units, Tolerance, Calibrated every, Responsible, Calibrated on, Method, Calibrated by, Lab or service, Certificate number, Reference value, Reading, Result, Adjusted, Next due, Note	An instrument (added when new, with its type and how often it is calibrated) and its calibration on a day (up to 3 points). Already there: the instrument; a calibration of it that day.
Maintenance (Maintenance, 6.50)	Equipment*, Area, Task*, Every (days)*, Next due, Last done, Done by, Note	A planned task of a piece of equipment on Locations, Areas and Equipment, and the days it was done (up to 60 days back). Already there: the same equipment and task (new days done are still recorded).
Controlled documents (Controlled Documents, 6.22)	Code*, Title*, Type, Revision*, Issued*, Last reviewed, Next review, Review every (months), Owner, Who must read it, What changed	A document and its revision in use (the newest of its rows), without its file: nobody is asked to read it until a revision with its file is published. Already there: a document with that code.
Traceability locations (Traceability > Locations, 6.61)	Type, Business name*, Phone, Address, City, State / province, ZIP / postal code, Country, Latitude, Longitude, Note	A new business, or a grower’s or customer’s location: only its empty fields are filled, nothing is replaced. Already there: nothing left to fill.

Records (page)	Columns (* required)	A record, and when it is already there
Growers' harvest records (Traceability, 6.62)	Grower*, Harvest date*, Commodity*, Variety, Field or growing area*, Quantity*, Unit, Harvested by, Reference document type, Reference document number, Cooling date, Cooled at, Note	A harvest, and its cooling when given, recorded by the site from a file (the grower sees it as recorded by the site); only at a site that takes harvest records. Already there: the same grower, day, commodity, field, quantity and unit.
CanadaGAP product library (Input Product Library, 6.78)	Trade name*, Type*, PCP #, Active ingredient, Registrant, Supplier, Unit, Maximum rate, Rate unit, REI (hours), Crop, PHI (days), Market, Notes	A product, or a product and crop when the PHI isn't the same for every crop; only while the site follows CanadaGAP. Already there: a product with that name and type, whose PHIs not yet in the library are added.
CanadaGAP agronomic input applications (Agronomic Inputs, 6.77)	Production site*, Grower, Application date*, Time, Type, Product*, PCP #, Lot #, Quantity used*, Quantity unit, Rate, Rate unit, Area treated, Area unit, Method, Label followed, PHI (days), REI (hours), Wind speed, Wind direction, Temperature (°C), Weather, Equipment, Applicator*, Applicator licence, Custom applicator, Note	An application (Form H1 or H2), checked as on Agronomic Inputs, with its earliest acceptable harvest date worked out, and added waiting for verification.
CanadaGAP pest monitoring (Pest Program, 6.80)	Building*, Date*, Device #, Area, Finding, Pest, Action taken, Checked by*	The rows of a building on a day: one monitoring round (Form M), as on Pest Program.

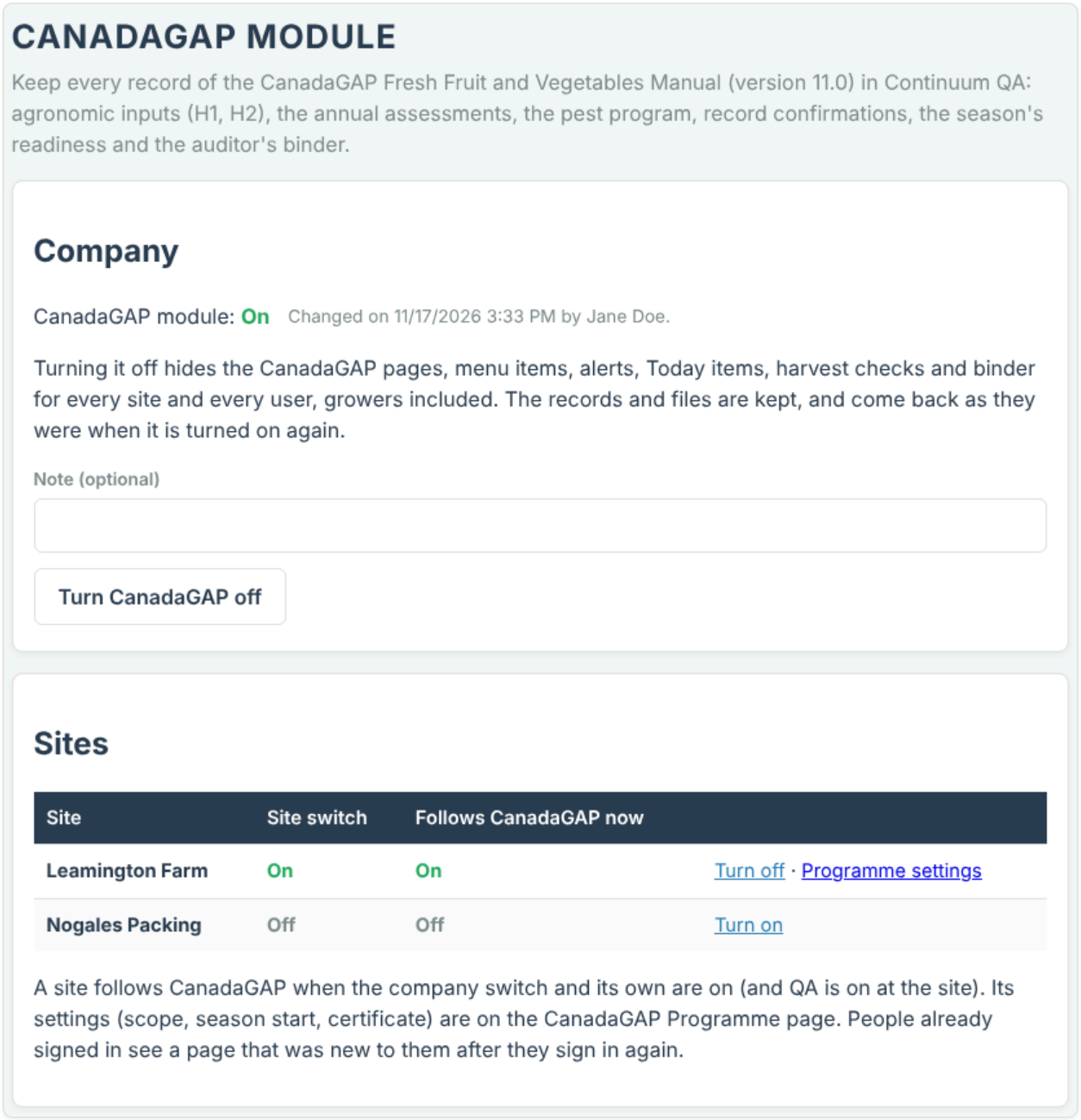
Note: Each feature's own limits apply, as when typing in, which matters when loading old records: lab and water samples up to a year back; swabs and their results 30 days; weight and metal detector checks 14 days; cold chain readings a year; training 5 years; maintenance days done 60 days. A failing water result, weight check or metal detector check needs What was done. An old approval or certificate already past its review or expiry shows as overdue, with its Trend Alert. Files (PDFs, certificates, sign-in sheets) can't come in a CSV: add them on the record's page.

Tip: The same import can run every night from a folder another system writes to (a lab's results, a temperature recorder's downloads, the shipping system's events): Continuum support sets it up on the server. The files it checks show under Files, from The job, and wait there unless it records them.

6.74 CanadaGAP Module

The CanadaGAP module keeps the records of the CanadaGAP Food Safety Manual for Fresh Fruits and Vegetables (version 11.0) in Continuum QA, for the sites that are certified: the agronomic inputs (Forms H1 and H2), the annual assessments, the pest program, the forms kept in the other QA pages, the confirmations of the person responsible, the season's readiness and the auditor's binder. It is optional: Overview > CanadaGAP Module turns it on or off for the company, and then for each site.

Who	What they do
Administrators, and Quality Control Managers of every site in use	Turn the module on or off for the company.
Quality Control Managers	Turn it on or off for their sites, and see the history of the switches.



The company switch and the site switches

TURNING IT ON

1. Go to Overview > CanadaGAP Module.
2. Type a Note if you want, and select Turn CanadaGAP on. Turning it on adds nothing to any site yet.
3. Under Sites, select Turn on beside each site that follows CanadaGAP.

A site follows CanadaGAP when the company switch and its own are on, and QA is on at the site. The first time a site is turned on, its assessment templates (Forms A, B, C, D, F, S, T, U and V) are loaded (see 6.79). Its settings, such as its scope, season start and certificate, are on the CanadaGAP Programme page (see 6.75): Programme settings opens them. People already signed in see the new pages after they sign in again.

TURNING IT OFF

Turn off beside a site, or Turn CanadaGAP off for the company, hides CanadaGAP at the site, or everywhere: the CanadaGAP menu and pages, for growers too; the Food Safety app's CanadaGAP logs; the CanadaGAP alerts, which clear at the next check; the harvest check (see 6.61 and 6.62); the CanadaGAP section of the Audit Pack, the imports and the CanadaGAP items of QA Setup. Nothing is deleted: turned on again, everything is back as it was. At a site that also follows Mexico, the pages the two modules share (Agronomic Inputs, the Input Product Library and Pest Program) stay, in Mexico's words (see 6.81).

> **Note:** The CanadaGAP Module page itself is never hidden, so the module can always be turned on again. History lists every switch with when, who and the note.

6.75 CanadaGAP Programme

CanadaGAP > CanadaGAP Programme shows where the site stands for its season: each form of the manual, whether it is done, and what is missing. From there, the person responsible confirms the records, the auditor's binder is printed, and the site's CanadaGAP settings and buildings are kept. The tabs at the top open the other CanadaGAP pages: Forms, Agronomic Inputs, Product Library, Assessments and Pest Program.

Who	What they do
Quality Control Managers	See the readiness of their sites, confirm records, keep the settings and the buildings, and copy another site's setup.

Who	What they do
Users with the CanadaGAP Programme permission	See the readiness and the binder, and confirm records; they don’t change the settings.

READINESS

Readiness shows the site and its season (from the season start in the settings), the scope and the manual’s version, then the readiness as a percentage: the forms done out of the forms that apply. Previous season shows the season before. The table lists every form, A to X, with its Kind (Annual, Ongoing or As it happens), its State, its records This season with the latest, when it was Last confirmed, and Open, which opens the page that keeps it.

CANADAGAP PROGRAMME

Programme | Forms | Agronomic Inputs | Product Library | Assessments | Pest Program

Readiness · Confirmations · Auditor's binder · Buildings and storages · Settings

Leamington Farm · season 2026-27

04/01/2026 to 03/31/2027 · scope: production, packing, storage · CanadaGAP Fresh Fruit and Vegetables Manual, version 11.0

← Previous season

Readiness

52%

Certificate CG-2026-0147 (Acme Certification) expires on 03/31/2027.

Pre-audit checklist | Auditor's binder

Form	Kind	State	This season	Last confirmed	
Form A · Buildings sketch and agricultural chemical storage	Annual	Done Done this season.	1 record(s) latest 11/17/2026		Open
Form B · Storage assessment	Annual	Due Not done or reviewed since the season started.	0 record(s)		Open
Form C · Personal hygiene and food handling policy (production site)	Annual	Due Not done or reviewed since the season started.	0 record(s)		Open
Form D · Personal hygiene and food handling policy (packinghouse)	Annual	Due Not done or reviewed since the season started.	0 record(s)		Open
Form E · Pest control for buildings	Annual	Done Done this season.	1 record(s) latest 11/17/2026		Open
Form F · Water (for cleaning) assessment	Annual	Due Not done or reviewed since the season started.	0 record(s)		Open
Form G · Cleaning, maintenance and repair of buildings	Ongoing	Done A record within the last 30 day(s).	1 record(s) latest 11/16/2026		Open · Form
Form H1 · Agronomic inputs: agricultural chemicals	Ongoing	Due 1 application(s) waiting for verification.	2 record(s) latest 11/11/2026	11/17/2026 · Jane Doe	Open
Form H2 · Agronomic inputs: fertilizers and other inputs	Ongoing	Due 2 application(s) waiting for verification.	3 record(s) latest 11/12/2026		Open

The readiness of a site's season

State	When
Done	Annual forms: done, or reviewed as still valid, since the season started. Ongoing forms: a record within their days (see Settings), or records kept this season.
Due	Not done yet this season; for H1 and H2, applications waiting for verification; for water tests, a result from a laboratory not known to be accredited.
Overdue	An ongoing form without a record within its days; for R, a corrective action past due without the action taken.
Kept as it happens	L, O, P2 and Q: recorded when it happens, not on a schedule.
Not applicable	Not in the site’s scope (production, packing, storage).
Can’t tell	The page that keeps it isn’t installed, or couldn’t be read.

X, the traceability test, is done with a mock recall in the last 12 months (see 6.28). With the pest program kept in Continuum Pest Control or by a pest control company, M is done when the latest service report, entered in the settings, is within its days.

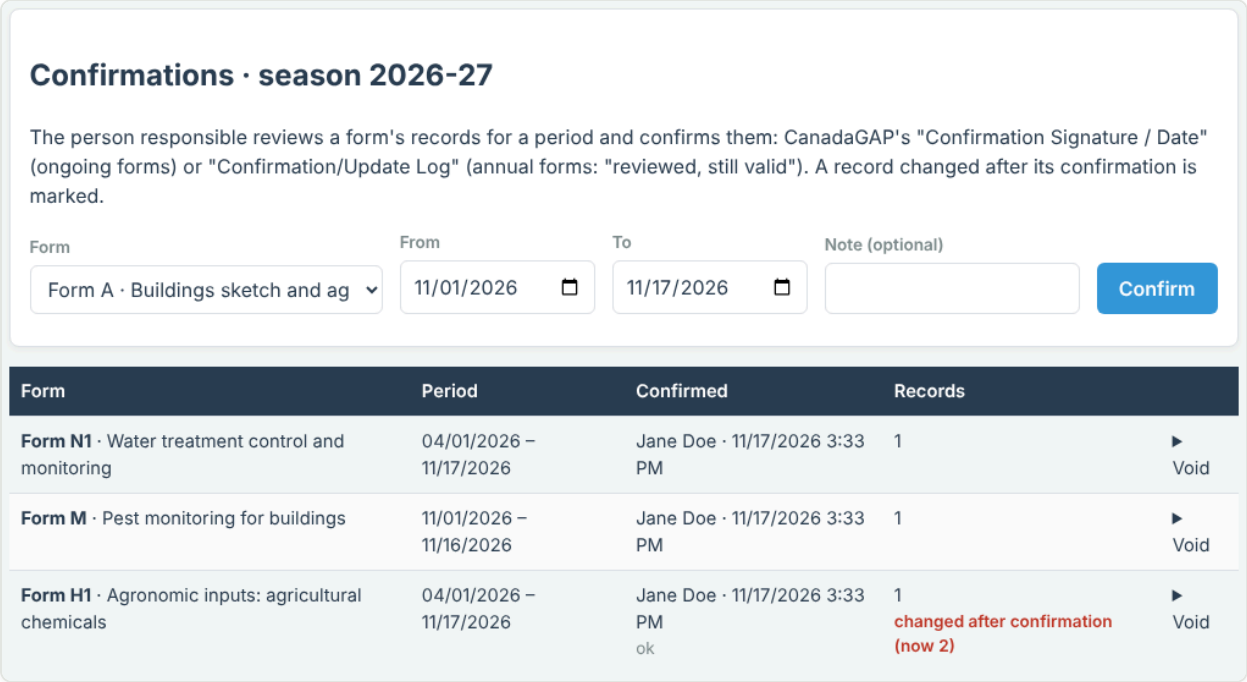
CONFIRMATIONS

CanadaGAP asks the person responsible to review the records and sign them: Confirmation Signature / Date on the ongoing forms, and the Confirmation/Update Log on the annual ones. Confirmations does it for a period:

1. Choose the Form, the period From and To, and type a Note if you want.
2. Select Confirm.

Your name and the date and time are kept, with how many records the period had. A record changed after its confirmation is marked changed after confirmation, with how many there are now. Quality Control Managers can Void a confirmation,

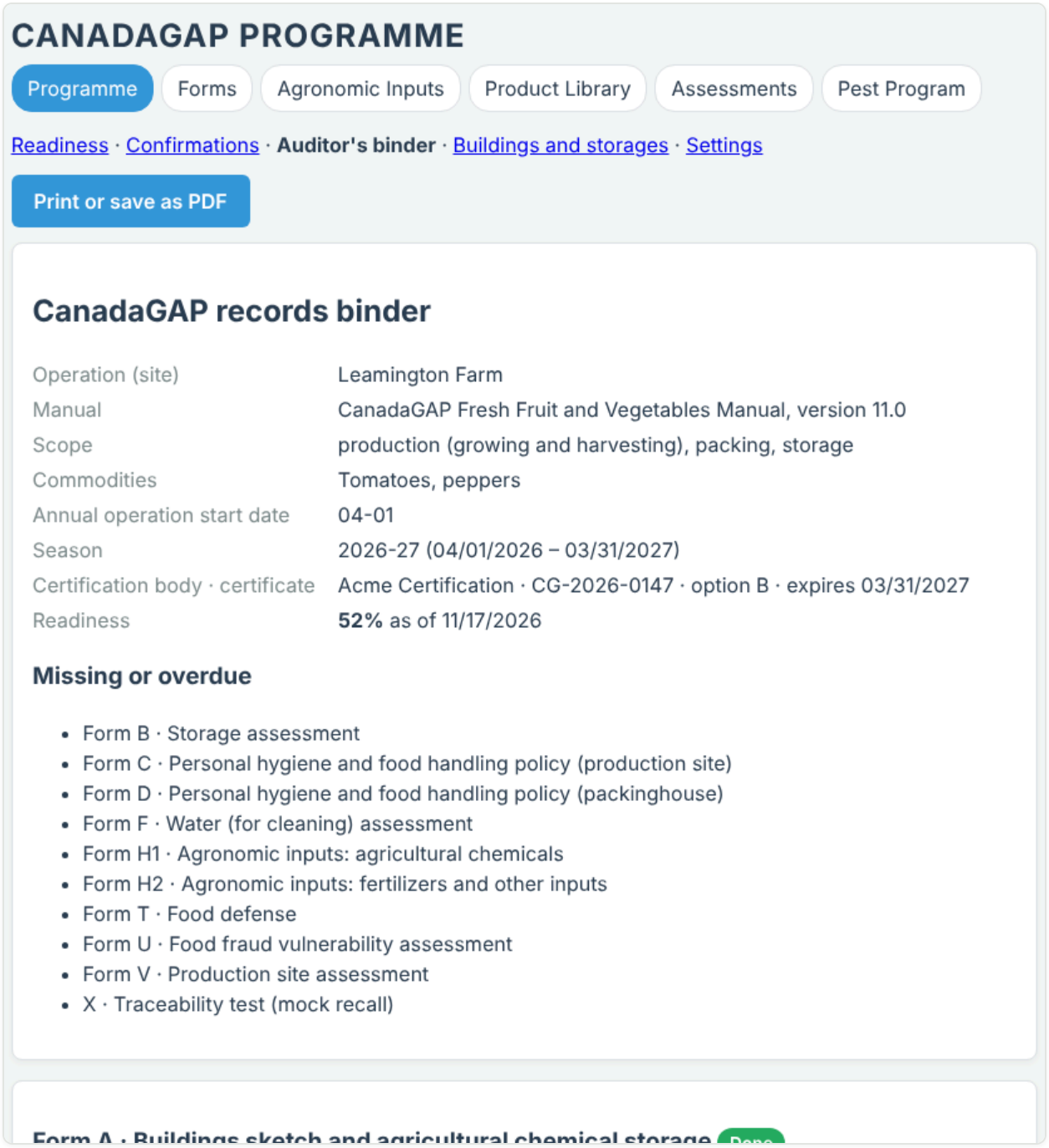
with why. The forms on CanadaGAP Forms are confirmed on that page too (see 6.76), and an application on Agronomic Inputs is verified one by one (see 6.77).



Confirming a form's records for a period

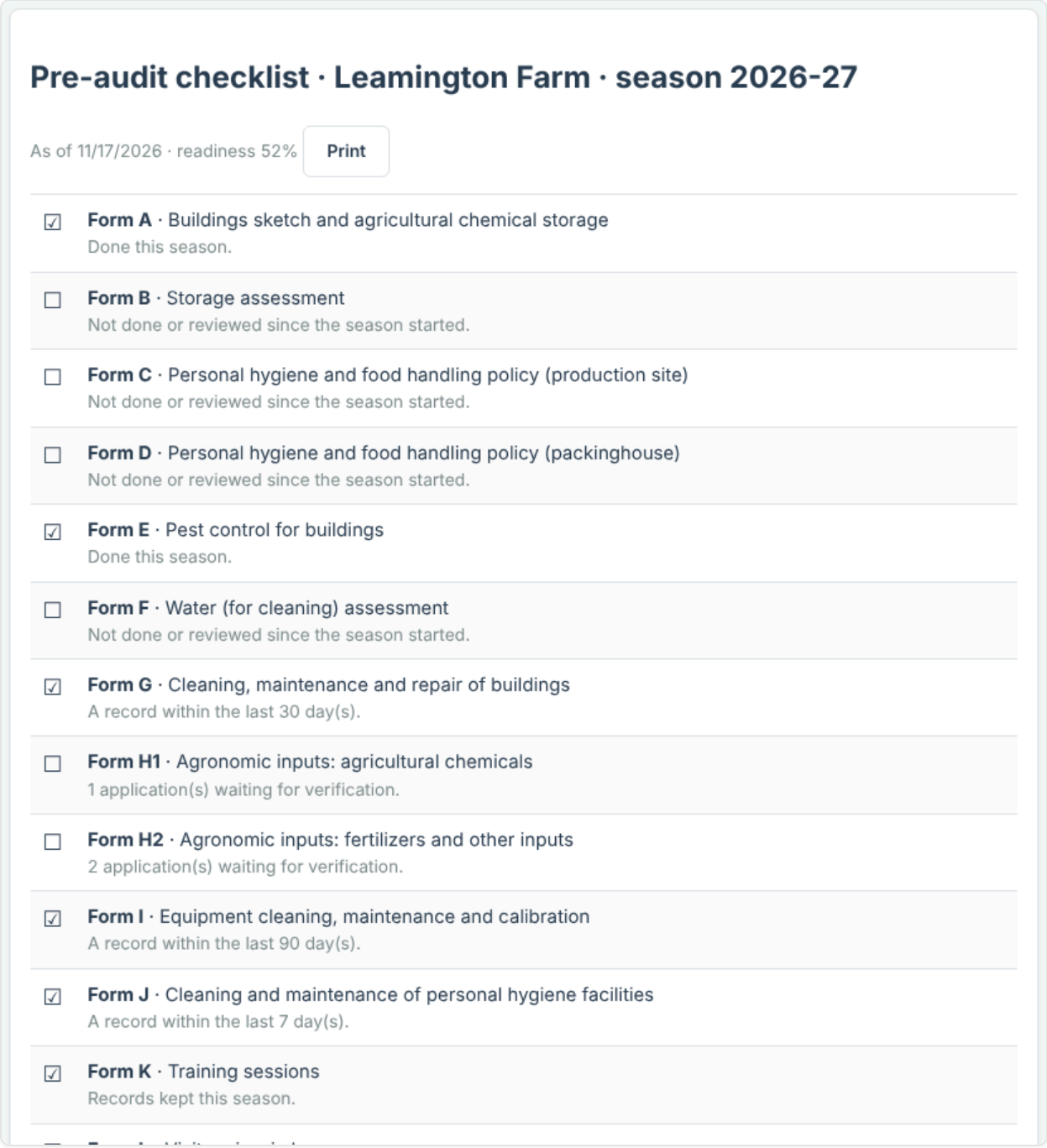
THE AUDITOR'S BINDER AND THE PRE-AUDIT CHECKLIST

Auditor's binder makes the records binder for the audit: the operation, the manual, the scope, the commodities, the annual operation start date, the season, the certification body and certificate, the readiness and what is missing or overdue; then each form with its state, its records this season, the page that keeps them, a link to its print, and its Confirmation/Update Log. Print or save as PDF prints it. Each confirmation is printed as Confirmed electronically by the person on the date.



The auditor's binder

Pre-audit checklist lists each form with a box, ticked when it is done, and why, with two last items to check yourself: the records are available within 24 hours and kept at least 4 years, and every ongoing form is confirmed by the person responsible. Print prints it.



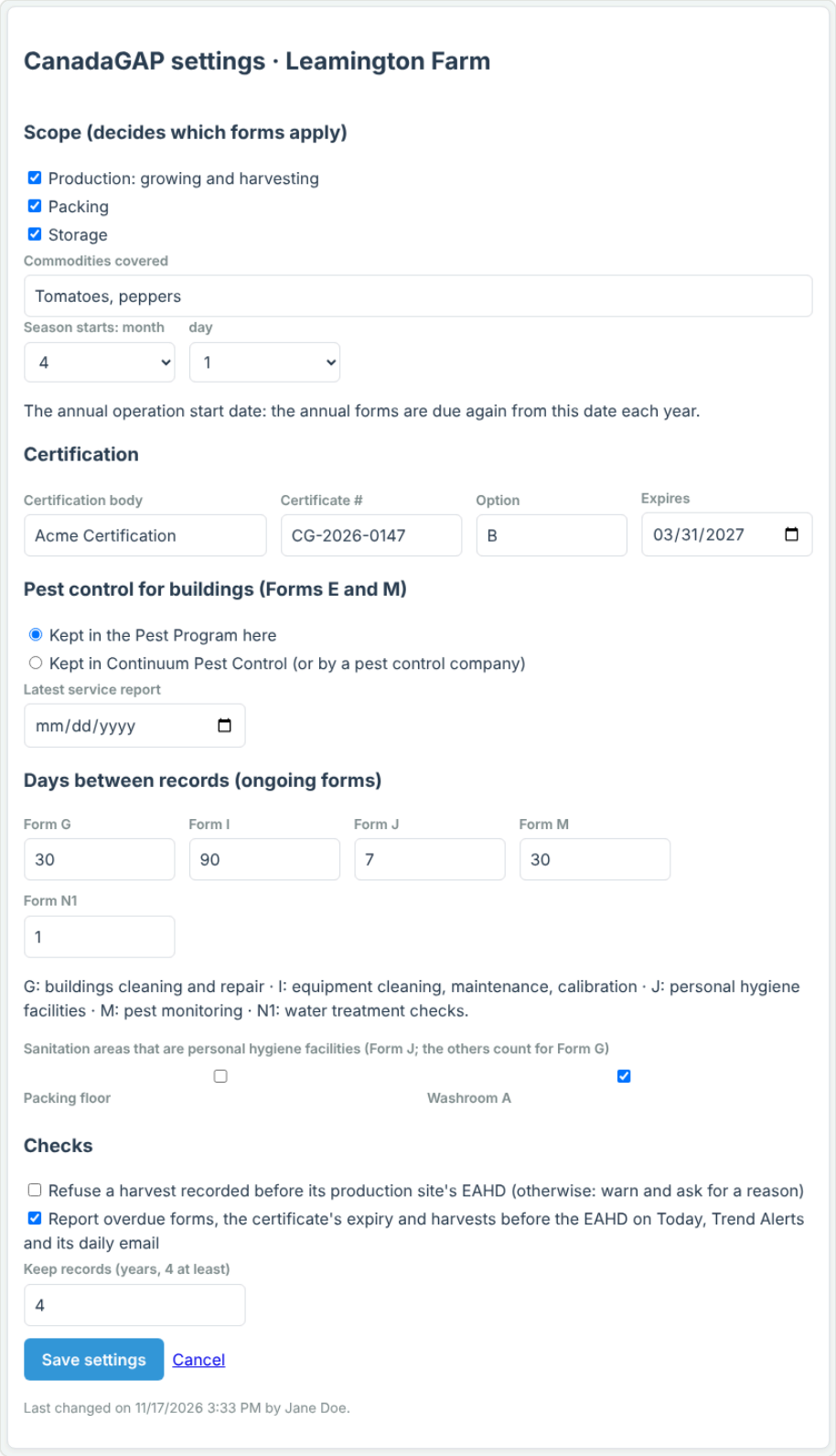
The pre-audit checklist

SETTINGS

Settings (Quality Control Managers) keeps what decides the site's forms:

- Scope: Production (growing and harvesting), Packing and Storage. A form not in the scope is shown as not applicable.

- Commodities covered, and when the season starts (month and day): the annual forms are due again from that day each year.
- Certification: the certification body, the certificate number, the option and when it expires. An alert warns 30 days before it expires.
- Pest control for buildings (Forms E and M): Kept in the Pest Program here (see 6.80), or Kept in Continuum Pest Control (or by a pest control company), with the date of the Latest service report.
- Days between records for the ongoing forms G, I, J, M and N1 (30, 90, 7, 30 and 1 to start with).
- The sanitation areas that are personal hygiene facilities: their records count for Form J, the others for Form G (see 6.41).
- Checks: Refuse a harvest recorded before its production site's EAHD (otherwise the harvest is recorded with a reason; see 6.61); and Report overdue forms, the certificate's expiry and harvests before the EAHD on Today, Trend Alerts and its daily email.
- Keep records (years): 4 at least.

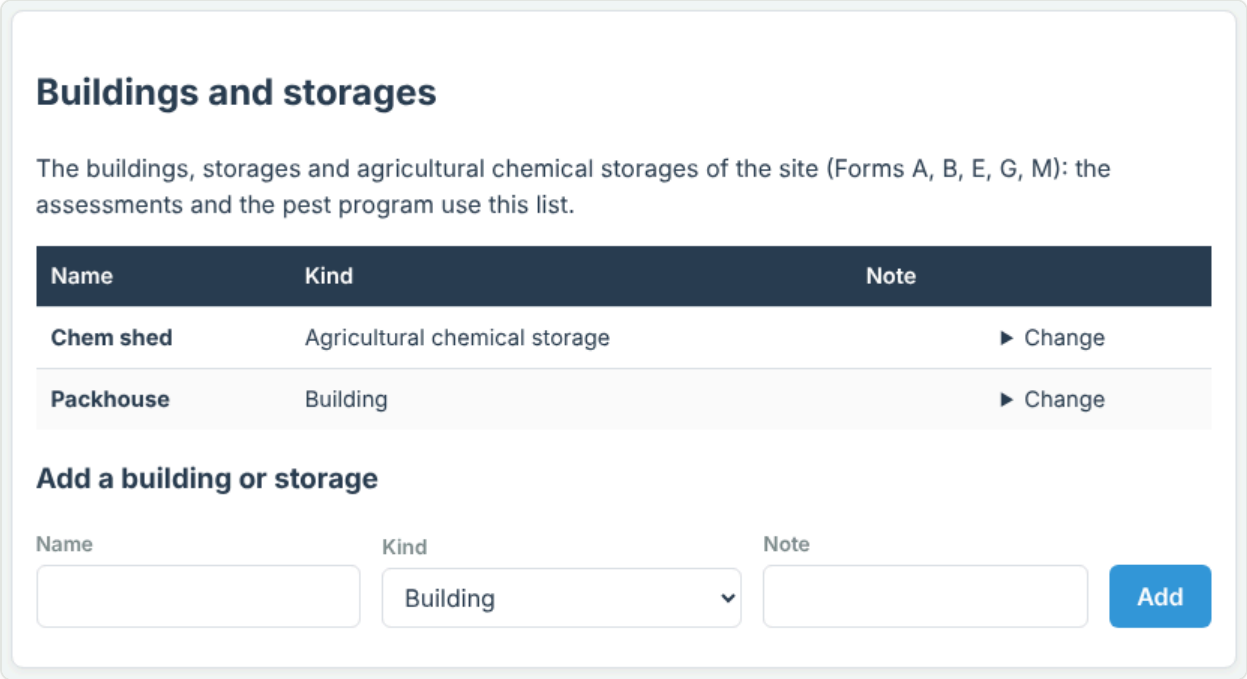


A site's CanadaGAP settings

Select Save settings. Last changed on shows when and by whom.

BUILDINGS AND STORAGES

Buildings and storages lists the site's buildings, storages and agricultural chemical storages. The assessments (Forms A and B) and the pest program (Forms E and M) use this list. Under Add a building or storage, type the Name, choose the Kind (Building, Storage or Agricultural chemical storage), type a Note if you want and select Add. Change renames one, changes its kind, or untick In use for one no longer used.



The site's buildings and storages

COPYING FROM ANOTHER SITE

A Quality Control Manager of two sites that follow CanadaGAP can bring one's setup to the other: at the bottom of Settings, open Copy from another site, choose the site under Copy from and select Preview. The preview lists what would be copied and what the site already has: the settings (not the certificate), when the site's were never saved; the buildings and storages, by name; each building's pest control plan and devices, where the site's building of that name has none; the assessment templates the site doesn't have, and a checklist the other site changed where the site's is still as loaded and never used; the other site's own products of the library with their PHIs; and the water laboratories. Select Copy

(with the number of things). Only what the site doesn't have is copied; nothing it has is changed, and no records are copied.

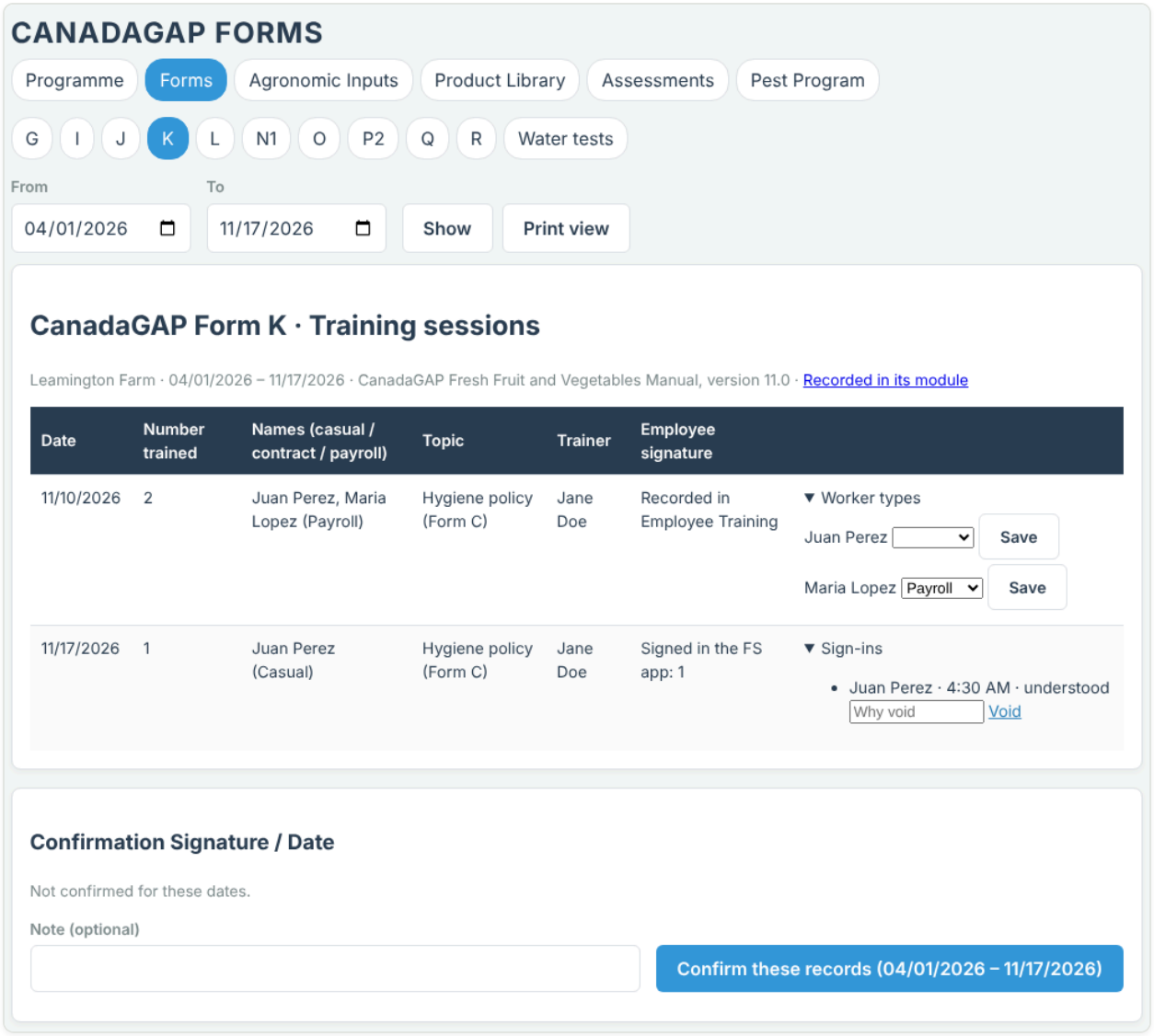
> **Note:** If something changed at either site after the preview, nothing is copied and the page asks you to look at the preview again.

6.76 CanadaGAP Forms

CanadaGAP > Forms shows, with the headings of the CanadaGAP forms, the records the site already keeps on its other QA pages: G (cleaning, maintenance and repair of buildings, from Sanitation and Maintenance), I (equipment cleaning, maintenance and calibration, from Maintenance and Calibration Records), J (personal hygiene facilities, from Sanitation), K (training, from Employee Training and the Food Safety app), L (visitors, from Visitors and Contractors), N1 (water treatment, from Wash Water), O (transporting product, from Load Inspections), P2 and Q (harvesting, packing and storing, from Traceability Events), R (deviations and corrective actions, from Corrective Actions) and the water tests (from Water Testing). The records stay on their pages; what a form asks that the page doesn't keep is added here.

Who	What they do
Quality Control Managers	See and print the forms of their sites, fill in what CanadaGAP asks that the other pages don't keep, keep the laboratories and confirm the records.
Users with the CanadaGAP Forms permission	The same at their site, except adding CanadaGAP's items to the checklists and voiding a sign-in.

1. Go to CanadaGAP > Forms (or Forms on the CanadaGAP tabs).
2. Choose the form (G, I, J, K, L, N1, O, P2, Q, R or Water tests), the dates From and To (the season so far, to start with) and select Show.
3. Print view shows the form as it prints.



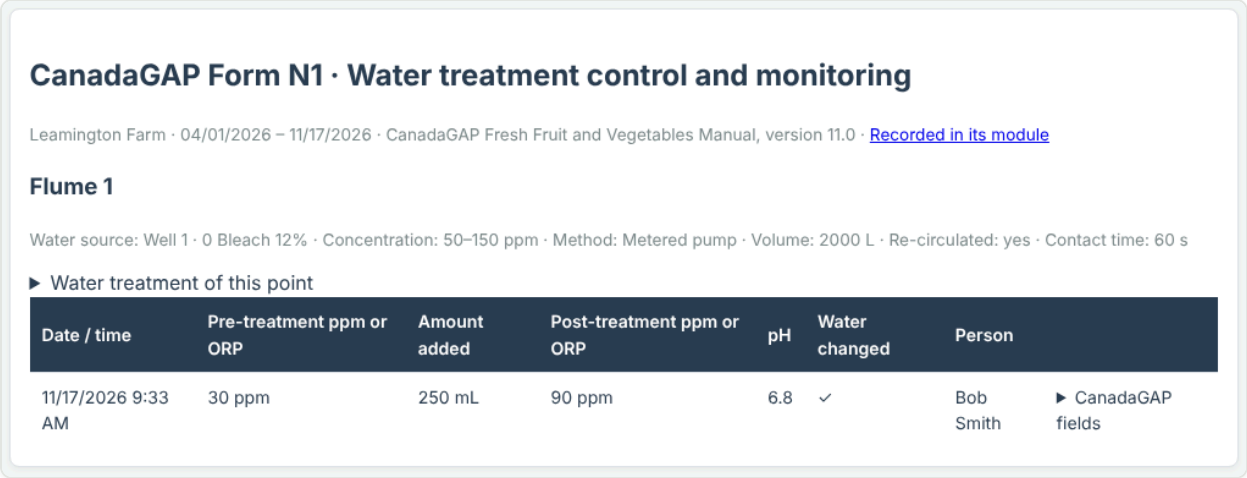
Form K, from Employee Training and the Food Safety app

WHAT THE FORMS ADD

- K: each worker's type, Casual, Contract or Payroll (Worker types), and the trainees' own sign-ins from the Food Safety app, with their signature (see 6.71); a sign-in made by mistake is voided with why.
- N1: each wash point's water treatment, the water source, the method, the volume, re-circulated or not and the contact time (Water treatment of this point), and the amount of sanitizer added at each check (CanadaGAP fields).
- P2 and Q: the storage, the packaging used (primary and secondary), whether it was checked, rotation, the date into storage and who packed it. P2 also shows,

for each harvest, whether the PHI and EAHD were met (see 6.77) and whether the production site was assessed (Form V).

- R: the person notified and when, the prevention of recurrence, new or modified procedures, and whether employees were retrained.
- J and O: Add the Form J items to the hygiene facilities' pre-op checklists, and the Form O items to the trailer checklist, add CanadaGAP's items to Sanitation and Load Inspections (Quality Control Managers).



CanadaGAP Form N1 · Water treatment control and monitoring

Leamington Farm · 04/01/2026 – 11/17/2026 · CanadaGAP Fresh Fruit and Vegetables Manual, version 11.0 · Recorded in its module

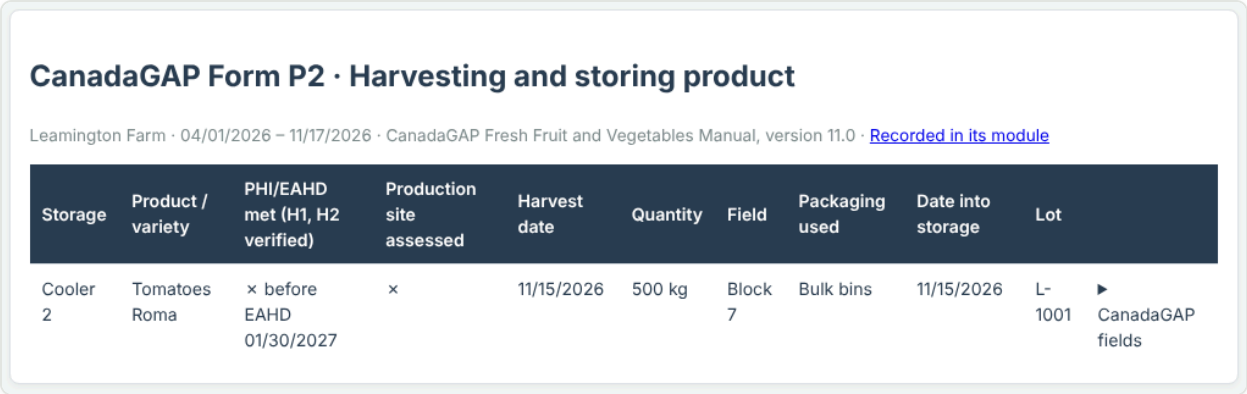
Flume 1

Water source: Well 1 · 0 Bleach 12% · Concentration: 50–150 ppm · Method: Metered pump · Volume: 2000 L · Re-circulated: yes · Contact time: 60 s

▶ Water treatment of this point

Date / time	Pre-treatment ppm or ORP	Amount added	Post-treatment ppm or ORP	pH	Water changed	Person	
11/17/2026 9:33 AM	30 ppm	250 mL	90 ppm	6.8	✓	Bob Smith	▶ CanadaGAP fields

Form N1, with the wash point's water treatment



CanadaGAP Form P2 · Harvesting and storing product

Leamington Farm · 04/01/2026 – 11/17/2026 · CanadaGAP Fresh Fruit and Vegetables Manual, version 11.0 · Recorded in its module

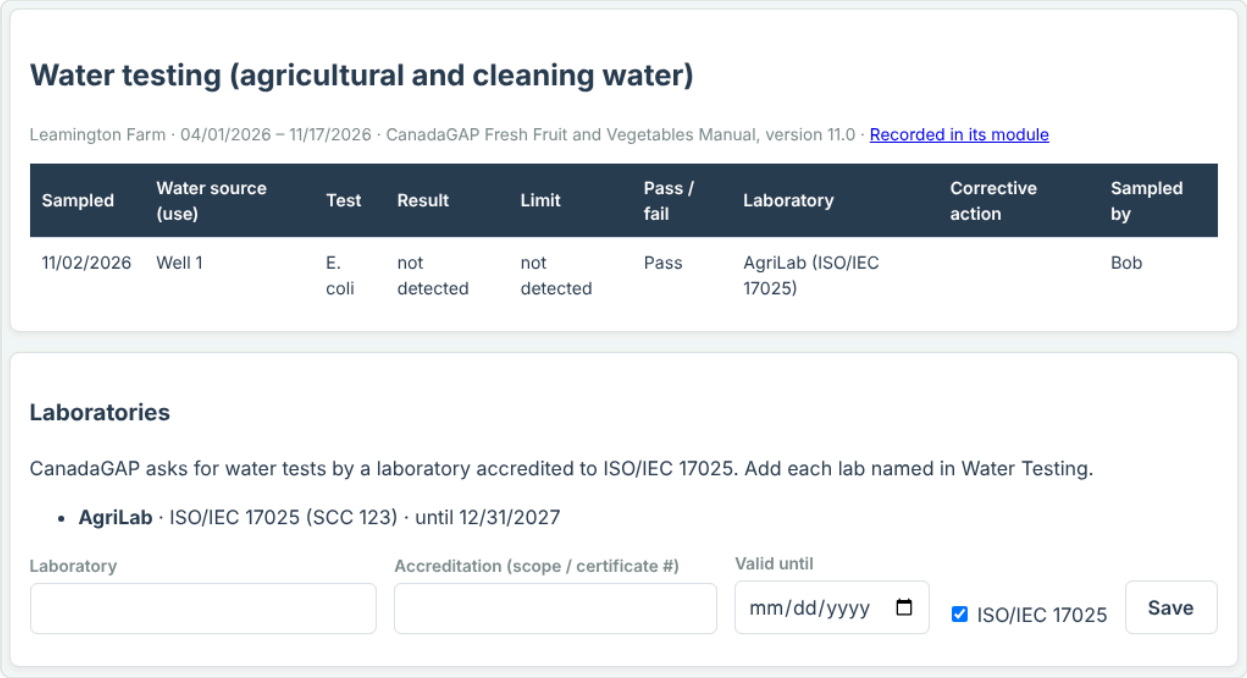
Storage	Product / variety	PHI/EAHD met (H1, H2 verified)	Production site assessed	Harvest date	Quantity	Field	Packaging used	Date into storage	Lot	
Cooler 2	Tomatoes Roma	× before EAHD 01/30/2027	×	11/15/2026	500 kg	Block 7	Bulk bins	11/15/2026	L-1001	▶ CanadaGAP fields

Form P2, with the harvest checked against the EAHD

WATER TESTS AND THE LABORATORIES

CanadaGAP asks for water tests by a laboratory accredited to ISO/IEC 17025. Water tests lists the site's results with their laboratory, and Laboratories keeps each lab named in Water Testing: type the Laboratory as it is named there, its Accreditation (scope or certificate number), Valid until, tick ISO/IEC 17025 when it

is accredited and select Save. While a result of the season comes from a lab not known to be accredited, the water tests show as Due on the Programme.



The water tests and the laboratories

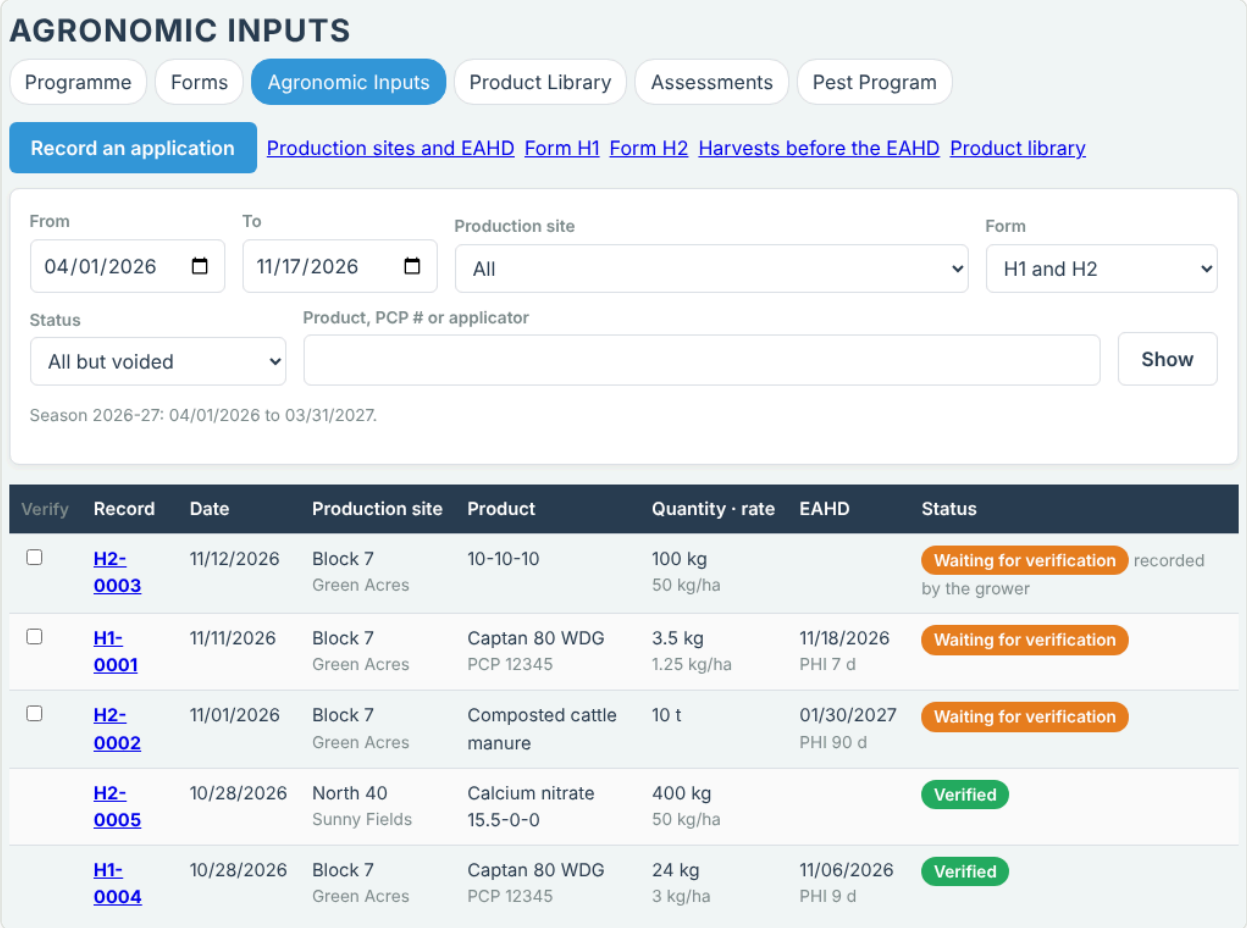
CONFIRMING A FORM

Under each form, Confirmation Signature / Date lists the confirmations of the dates shown. Type a Note if you want and select Confirm these records with the dates: the confirmation is the same as on the Programme's Confirmations (see 6.75).

6.77 Agronomic Inputs

CanadaGAP > Agronomic Inputs keeps Forms H1 (agricultural chemicals) and H2 (fertilizers and other inputs: manure, compost, compost tea, by-products, soil amendments, mulch, row covers) for each production site, a grower's field. Each application gets its earliest acceptable harvest date (EAHD): the application date plus the pre-harvest interval (PHI) in calendar days. A production site's EAHD is the latest of its applications', and the harvest records are checked against it (see 6.61 and 6.62).

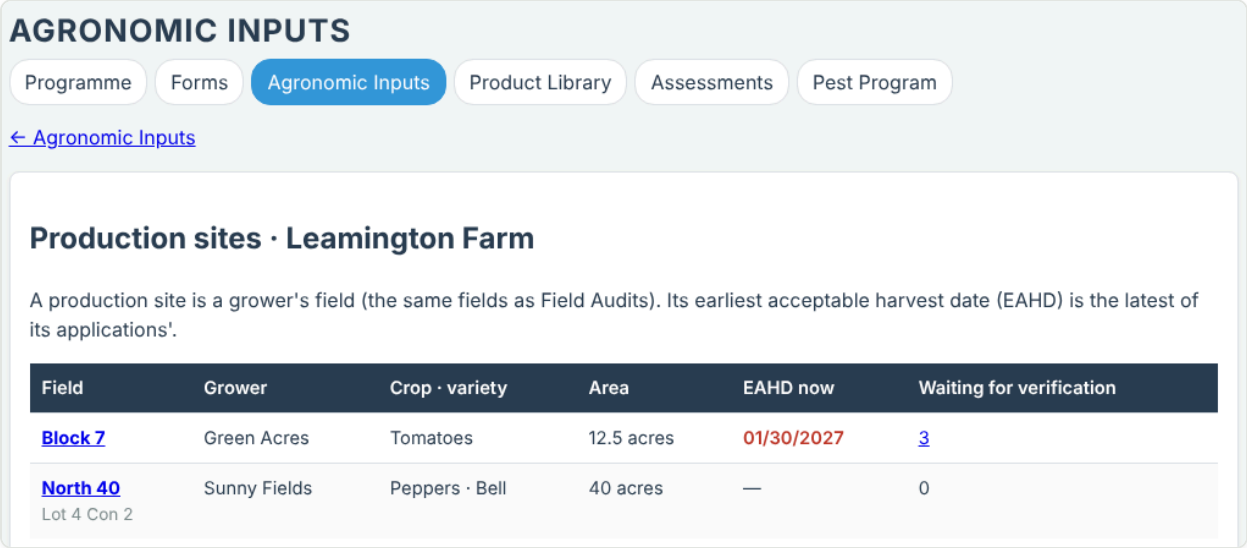
Who	What they do
Quality Control Managers, and Users with the Agronomic Inputs permission	Record, correct and verify the applications of their sites, keep the production sites, and void a record made by mistake.
Growers	Record the applications on their own fields from the grower menu, and see their fields' EAHD.
The Food Safety app	Sends the applications recorded in its Agronomic input log (see 6.71).



The applications of a season

PRODUCTION SITES

Production sites and EAHD lists the production sites: the growers' fields, the same as on Field Audits (see 6.53). Each shows its grower, crop and variety, its area, its EAHD now and how many applications are waiting for verification. Under Add a production site, choose the Grower and type the Field # or name, the Field ID or legal description, the Current crop and Variety, the Date planted, the Area and its unit, the Previous year crop(s) and the Location, then select Add.



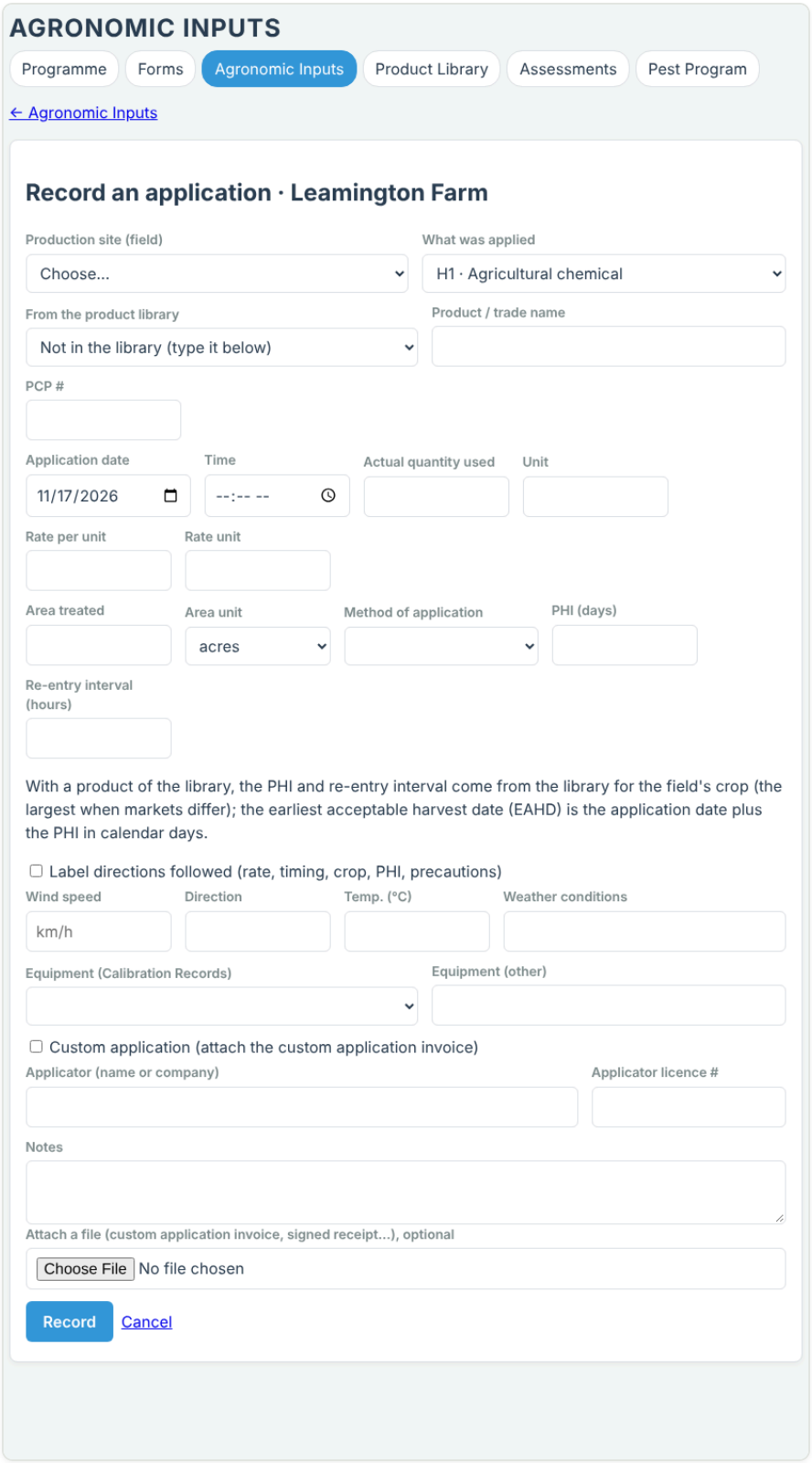
The production sites and their EAHD

RECORDING AN APPLICATION

1. Select Record an application.
2. Choose the Production site (field) and What was applied: H1 · Agricultural chemical, H2 · Fertilizer, or H2 · Other input (manure, compost, by-product, mulch, row cover…).
3. Choose the product From the product library (see 6.78), or Not in the library (type it below) and type the Product / trade name and, for a chemical, its PCP #; for a fertilizer, the Blend, the Fertilizer lot #, the Type and the Supplier.
4. Enter the Application date and Time, the Actual quantity used and its Unit, the Rate per unit and its unit, the Area treated (acres or hectares) and the Method of application.
5. For a product not in the library, type the PHI (days), or the wait before harvest for manure and compost, and the Re-entry interval (hours). With a product of

the library, they come from the library for the field’s crop.

6. For a chemical, tick Label directions followed (rate, timing, crop, PHI, precautions), and enter the weather (Wind speed, Direction, Temp. (°C), Weather conditions).
7. Choose the Equipment from Calibration Records, or type it; tick Custom application for a custom applicator, and type the Applicator (name or company) and the Applicator licence #.
8. Attach a file if you want (the custom application invoice, a signed receipt) and select Record.



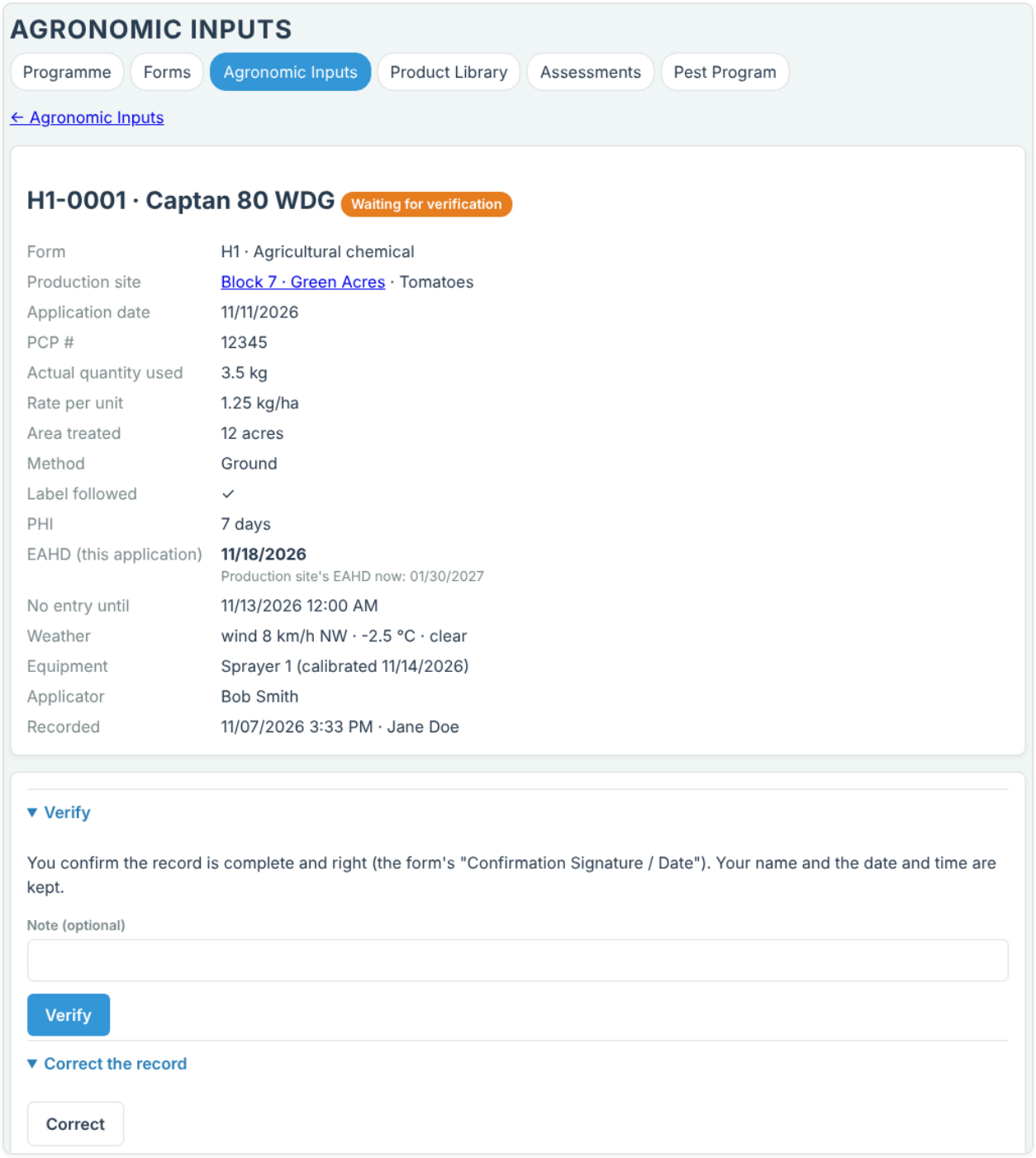
Recording an application

The record gets its number, such as H1-0001, and waits for verification. A chemical needs its PCP #, its rate and the area treated, its method and the label

followed; the date can’t be later than today. The page shows the application’s EAHD, the production site’s EAHD now and, with a re-entry interval, No entry until.

VERIFYING, CORRECTING AND VOIDING

Verifying is the forms’ Confirmation Signature / Date: someone responsible checks that the record is complete and right. Open the record and under Verify, type a Note if you want and select Verify; or tick several waiting ones on the list and select Verify the ones ticked. Your name and the date and time are kept.

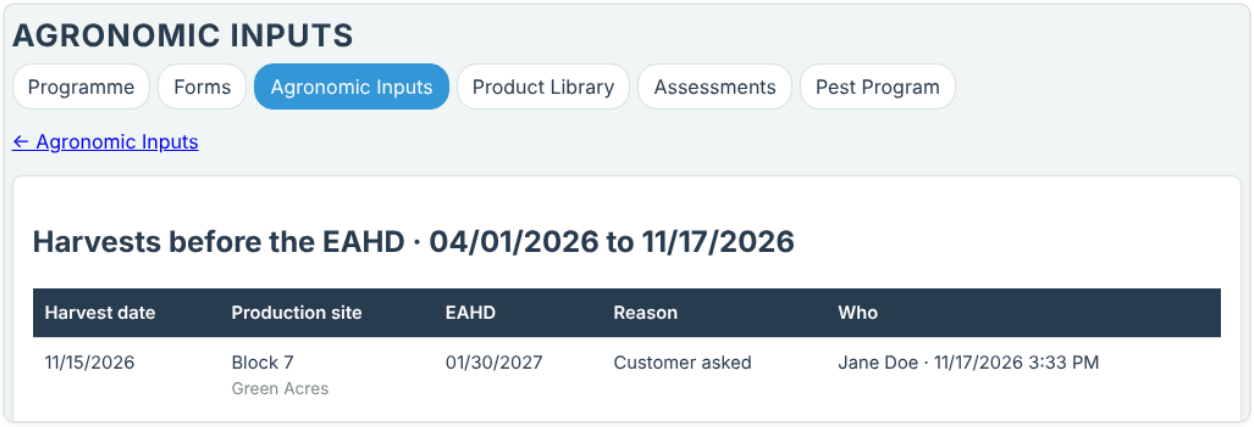


An application waiting for verification

Correct the record changes it; a verified record goes back to waiting for verification, and History shows each change with the value before and after. Void (recorded by mistake) takes it out with why; it stays on the list when you choose Voided. Files keeps the invoice of a custom application, receipts and letters of assurance.

HARVESTS BEFORE THE EAHD

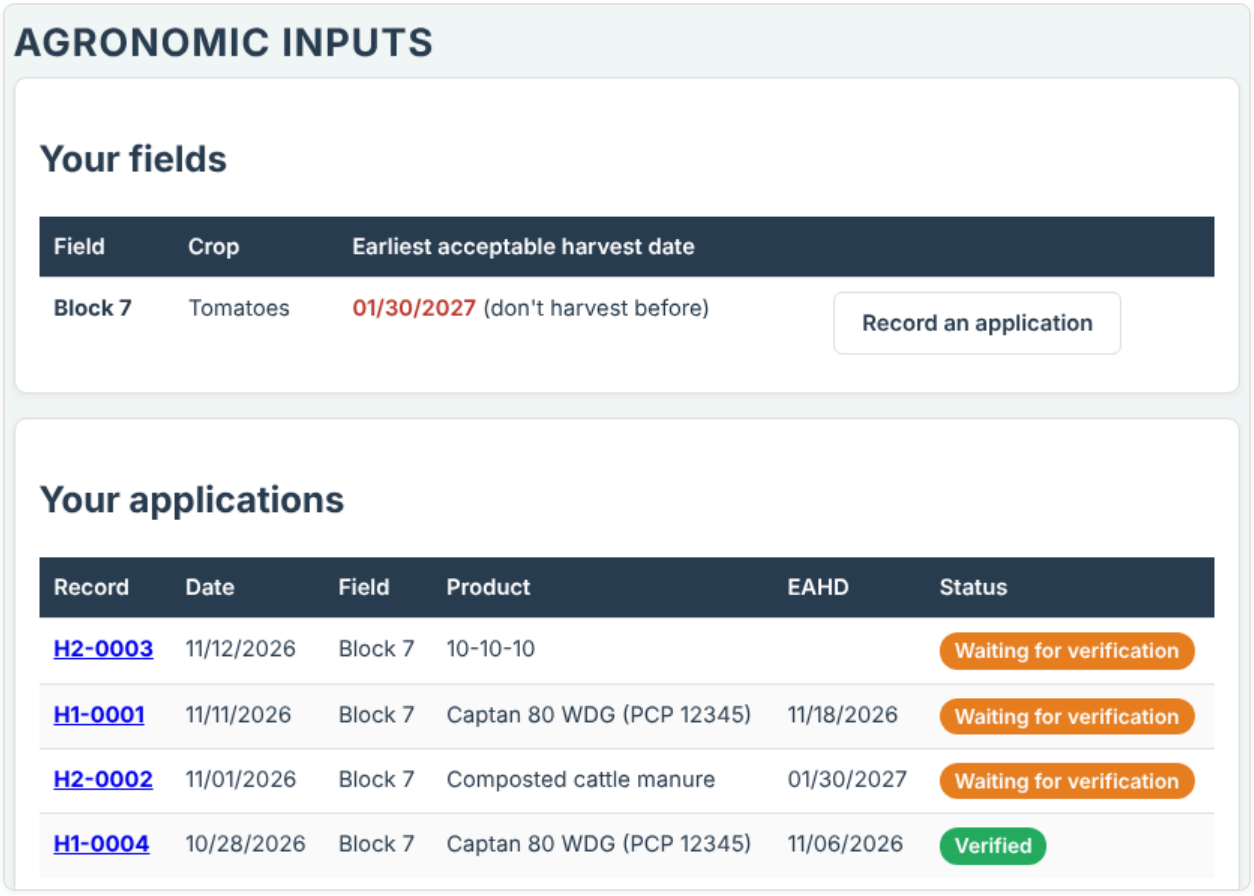
Harvests before the EAHD lists the harvests recorded on Traceability Events or by the growers before their production site's EAHD, with the reason given and who gave it (see 6.61). Form H1 and Form H2 print the forms for the dates chosen.



A harvest recorded before the EAHD

IN THE GROWER MENU

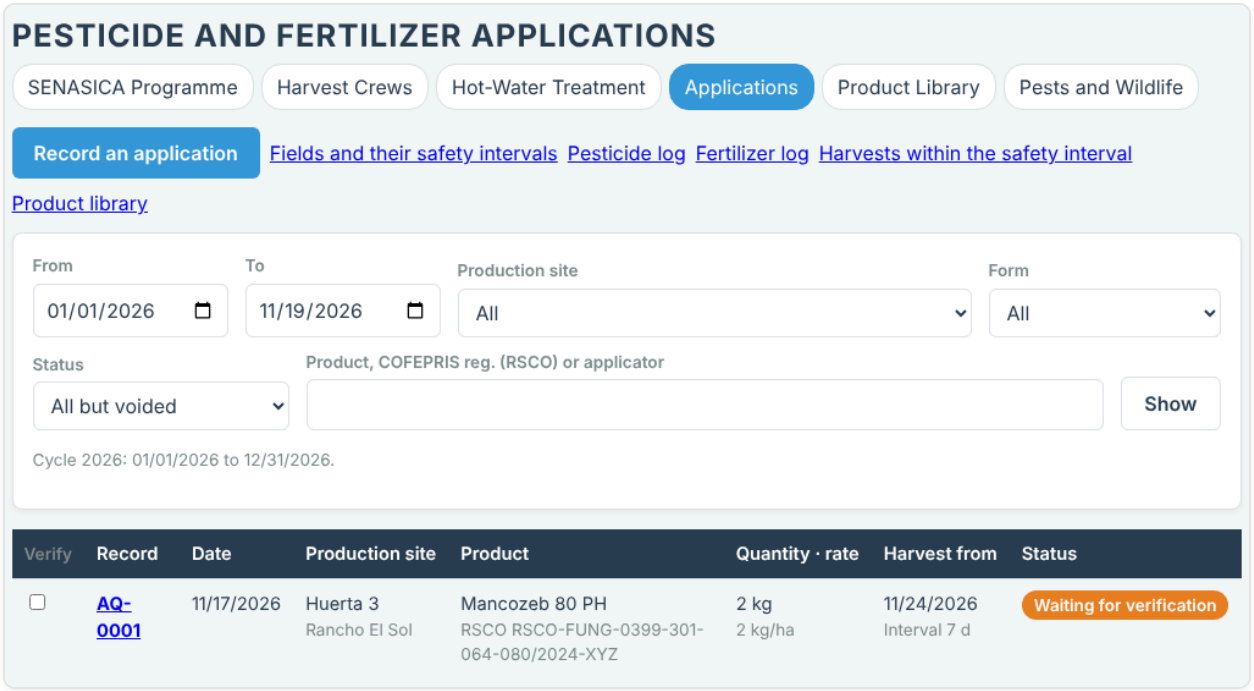
Growers see Agronomic Inputs on the grower menu while a site of theirs follows CanadaGAP. Your fields shows each field with its crop and its EAHD (don't harvest before), and Record an application records one as above, without the verification: the site verifies it, and it shows recorded by the grower. Your applications lists them with their status; a grower corrects one of their own until it is verified.



A grower's fields and applications

AT A SITE THAT FOLLOWS MEXICO

At a site that follows Mexico (see 6.81), the page is Mexico > Pesticide and Fertilizer Applications, in Mexico's words: Pesticide log and Fertilizer log instead of Forms H1 and H2, records numbered AQ- (pesticides) and FE- (fertilizers and other inputs), the COFEPRIS registration (RSCO, up to 40 characters) instead of the PCP #, and the safety interval instead of the PHI. Recording an application also asks for its start and end (date and time) and who made the technical recommendation (attach it). The field may be harvested from the application date plus the safety interval, in calendar days: Fields and their safety intervals shows it, and Harvests within the safety interval lists the harvests recorded before it, with their reason (see 6.61 and 6.83). Verifying keeps the name of the person responsible for the SRRC. The import from a file isn't offered at a site that follows only Mexico.

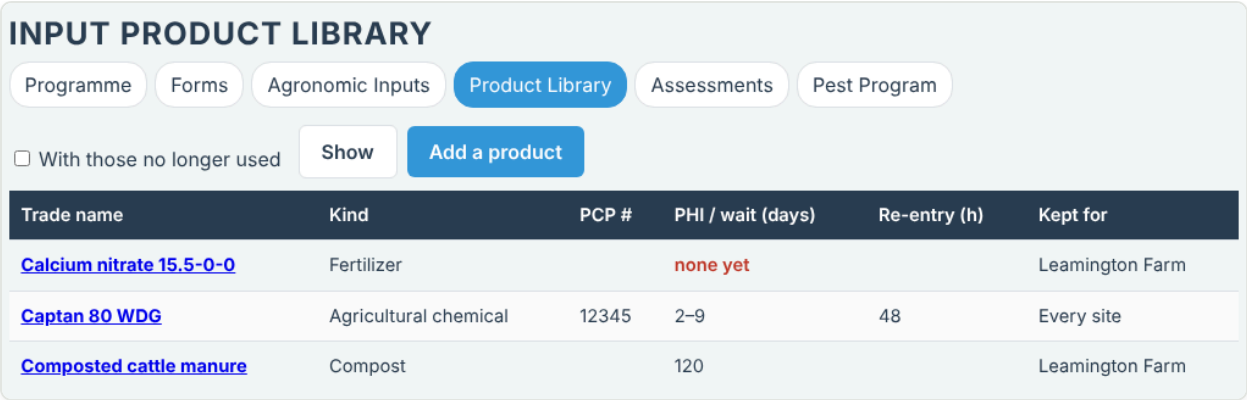


The applications at a site that follows Mexico

6.78 Input Product Library

CanadaGAP > Product Library keeps the agricultural chemicals, fertilizers and other inputs the sites use, so an application only picks the product: its PCP #, its re-entry interval and its pre-harvest interval for the field's crop come from the library.

Who	What they do
Quality Control Managers, and Users with the Input Product Library permission	Add and change the products of their sites, and their PHIs.
Quality Control Managers and Administrators	Also keep the products used at every site (Kept for: Every site).

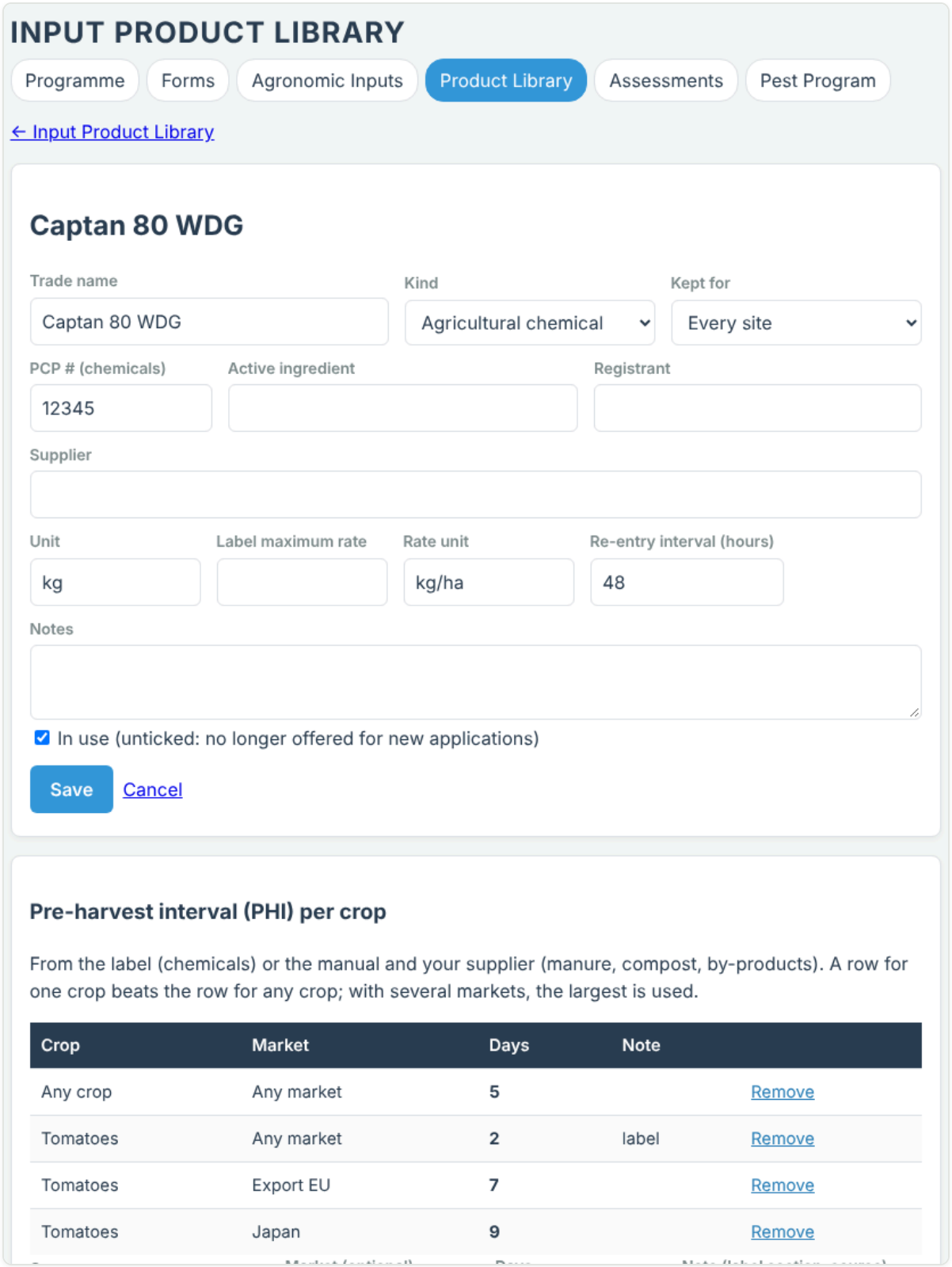


The product library

1. Select Add a product.
2. Type the Trade name and choose the Kind (Agricultural chemical, Fertilizer, Manure, Compost, Compost tea, By-product, Pulp sludge, Soil amendment, Mulch, Row cover or Other) and who it is Kept for: one site, or Every site.
3. For a chemical, type the PCP # (the registration number on the label), the Active ingredient and the Registrant. Then the Supplier, the Unit, the Label maximum rate and its unit, the Re-entry interval (hours) and Notes.
4. Select Save.

THE PRE-HARVEST INTERVAL

Under Pre-harvest interval (PHI) per crop, add the days from the label for each crop (or Any crop), and for a market whose PHI is longer, such as an export market: choose the Crop, type the Market (optional), the Days and a Note (the label section, the source), and select Save. For manure, compost and by-products, the days are the wait before harvest, from the manual and your supplier. A row for one crop beats the row for any crop, and with several markets the largest is used.



A product and its PHIs

> **Note:** A product no longer used is unticked In use: it is no longer offered for new applications, and the applications already recorded keep it. A change of PHI applies to applications recorded after it.

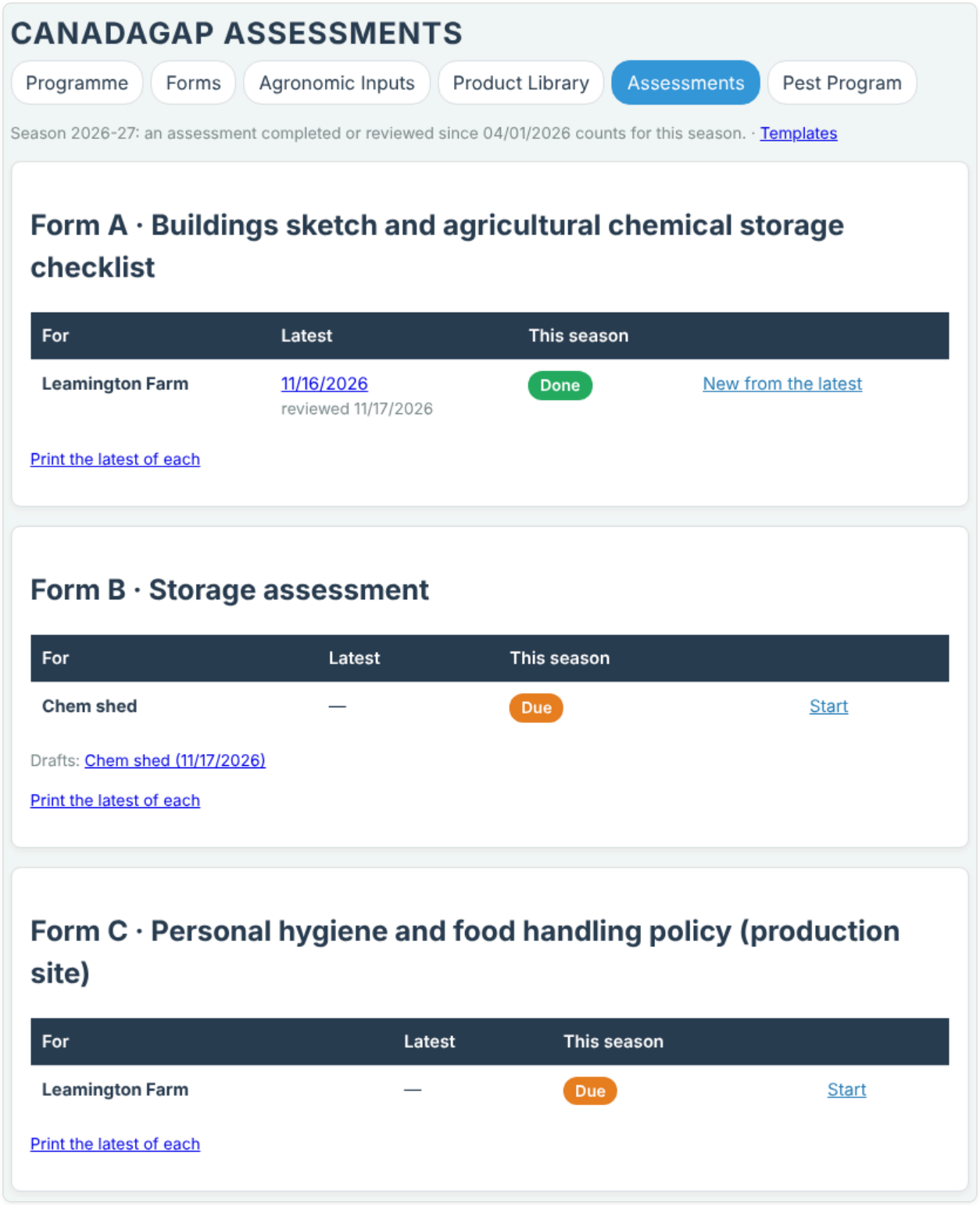
AT A SITE THAT FOLLOWS MEXICO

At a site that follows Mexico, the page is Mexico > Input Products and Receipts: each product with its COFEPRIS registration (RSCO), the safety interval (days) and the re-entry interval. Inputs received keeps each delivery of an input (SRRC 8.3.2 and 12.5.4): the product, its active ingredient or formulation, the lot and quantity, the supplier and its SENASICA certification, the invoice and who received it, numbered REC-. They count on the SENASICA Programme's readiness (Inputs received, Modules 8 and 12; see 6.82).

6.79 CanadaGAP Assessments

CanadaGAP > Assessments keeps the annual forms as checklists: A (buildings sketch and agricultural chemical storage), B (storage), C and D (personal hygiene and food handling policies, production site and packinghouse), F (water for cleaning), S (allergen information), T (food defense), U (food fraud vulnerability) and V (production site assessment). Each counts for the season once it is completed, or once the latest is reviewed and still valid.

Who	What they do
Quality Control Managers	Do and review the assessments of their sites, void one, and keep the templates.
Users with the CanadaGAP Assessments permission	Do and review the assessments of their site; void a draft of their own.

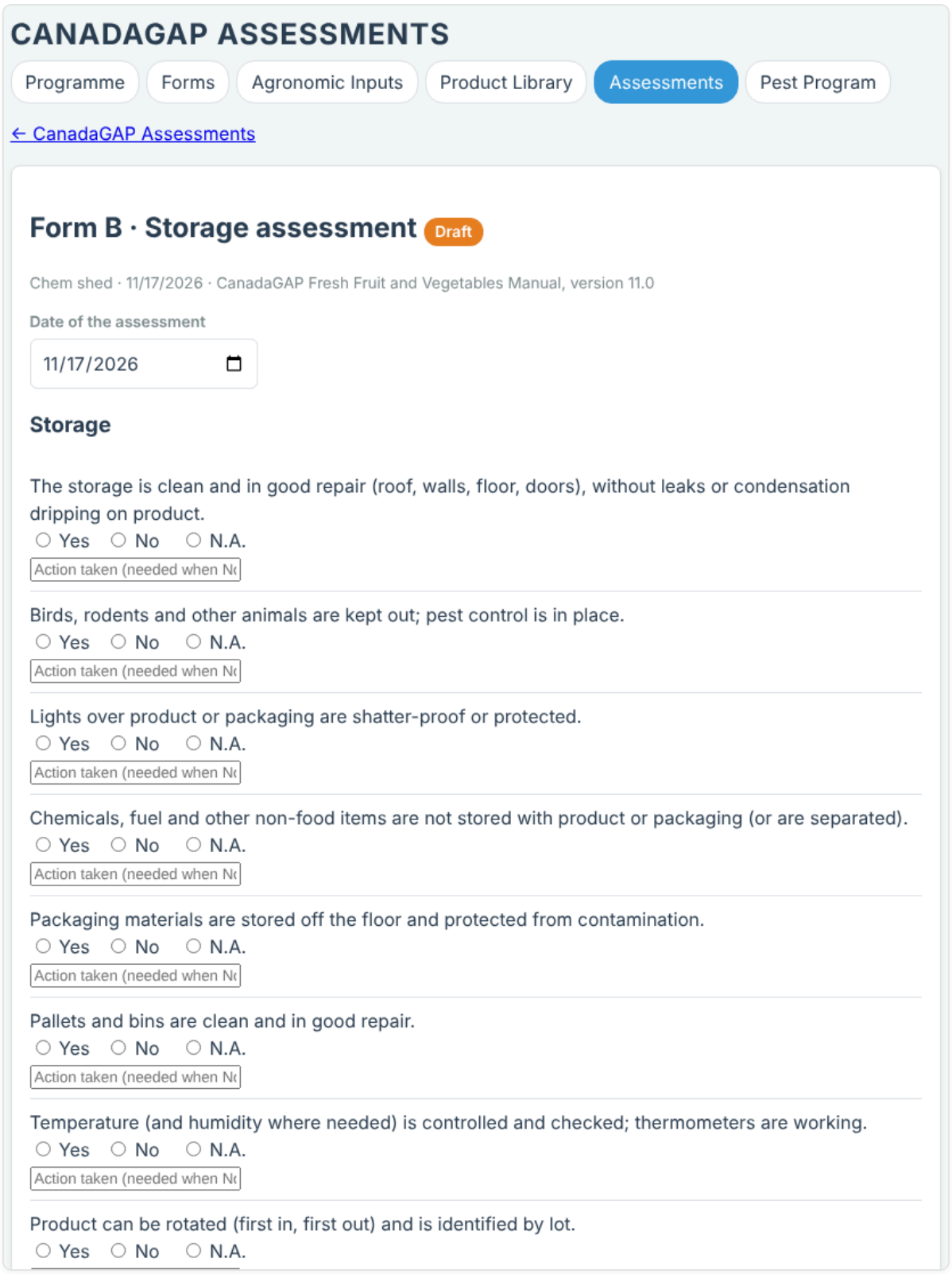


Each form, and what it is for

DOING AN ASSESSMENT

Each form is listed with what it is for: the site, a building or storage (Form B), a water source (Form F) or a production site (Form V). Select Start (or New from the

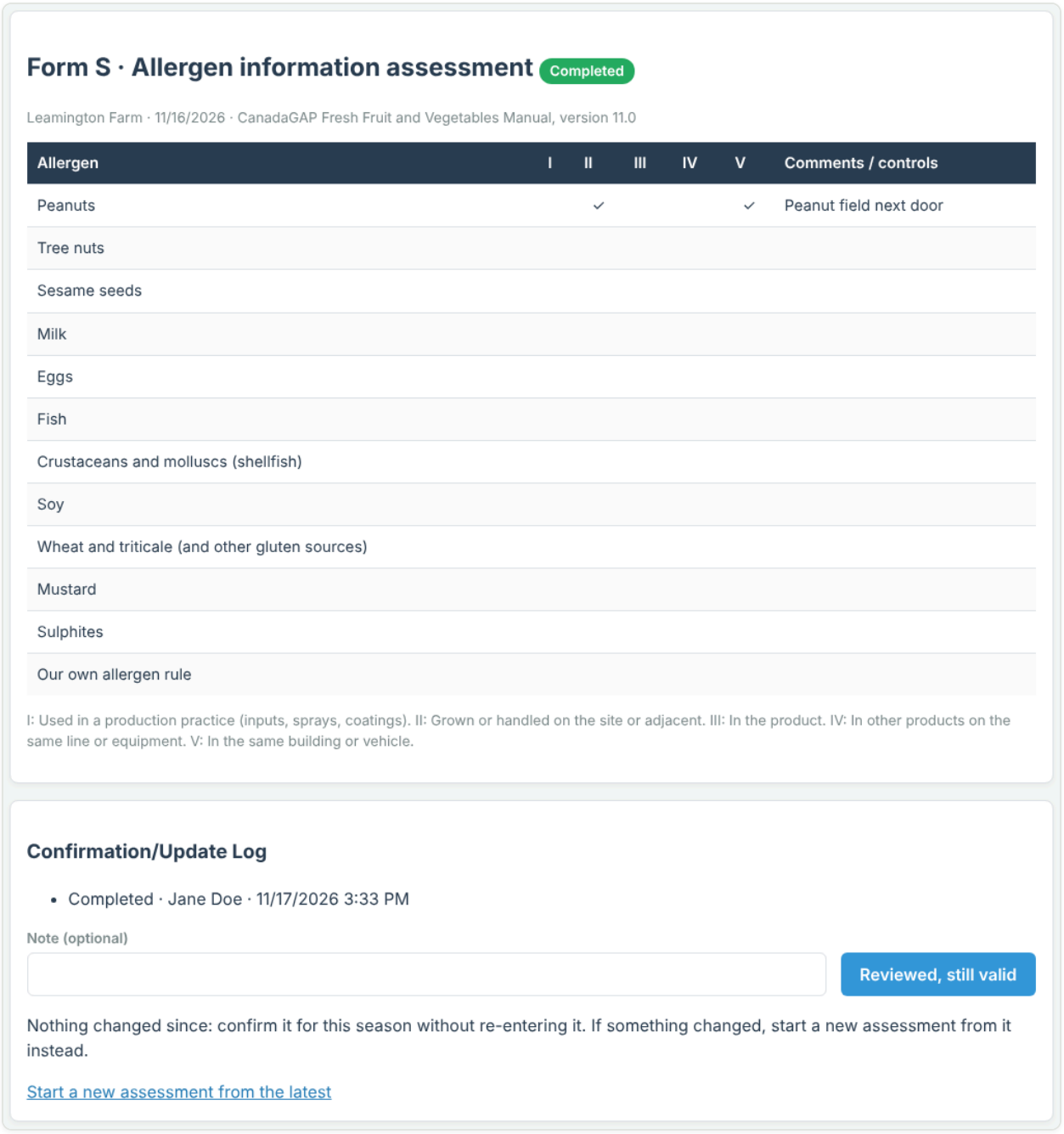
latest, which starts from the latest one’s answers). Enter the Date of the assessment and answer each item: Yes, No or N.A., with the Action taken needed for a No; text, a date or the policy for the others. Form S is the allergen matrix: for each allergen, tick where it is found (I to V) and type the controls. Save draft keeps it to finish later; Complete records it.



An assessment in progress

REVIEWED, STILL VALID

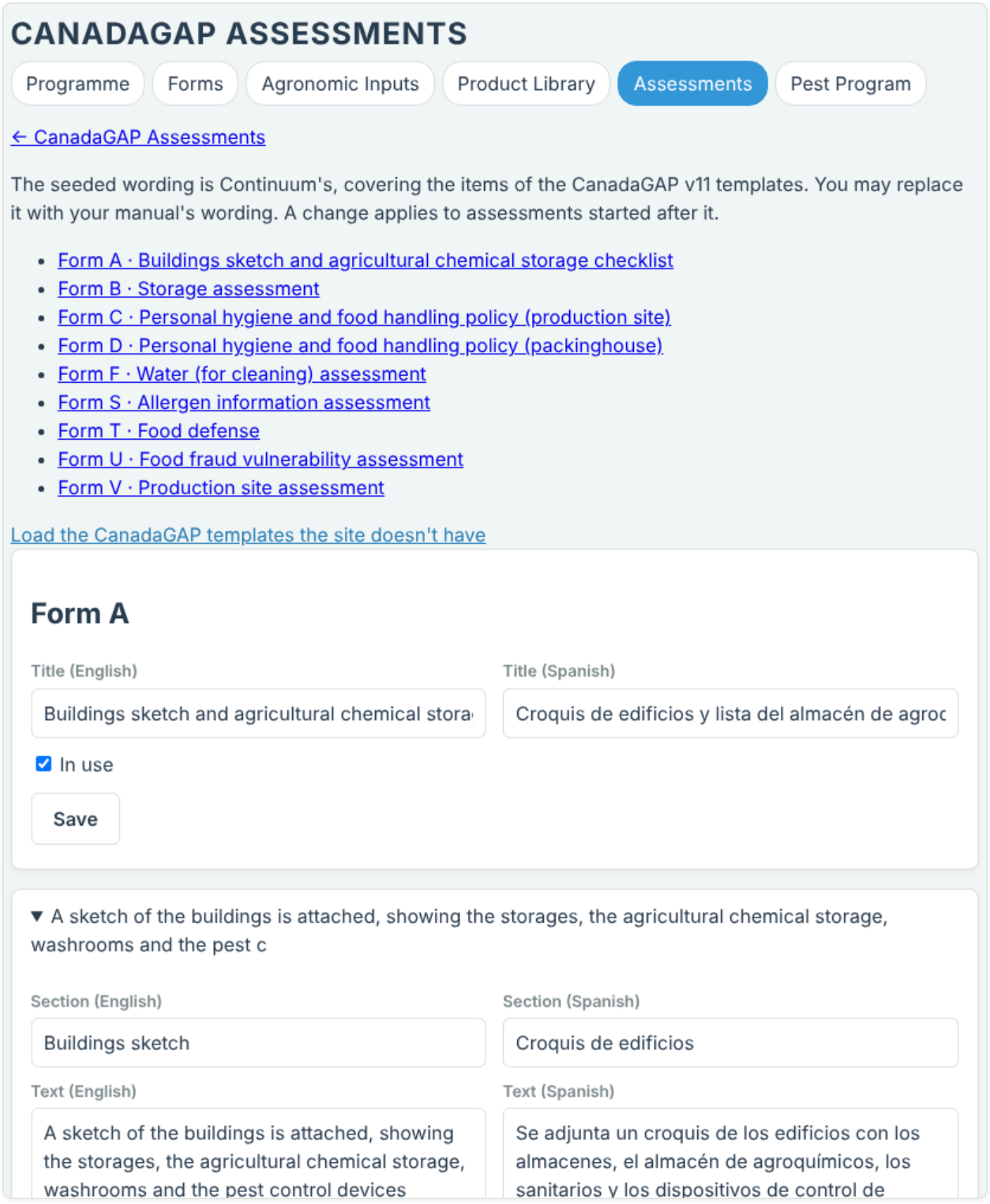
CanadaGAP's Confirmation/Update Log asks for each annual form to be reviewed. When nothing changed, open the latest, type a Note if you want and select Reviewed, still valid: it counts for the season without being entered again. When something changed, select Start a new assessment from the latest instead. Files keeps the buildings sketch (Form A) and the other documents; Void takes out one recorded by mistake, with why.



A completed allergen matrix, and its Confirmation/Update Log

TEMPLATES

Templates (Quality Control Managers) keeps each form’s title and items, in English and in Spanish. The wording loaded is Continuum’s, covering the items of the CanadaGAP version 11 templates; you may replace it with your manual’s. Open an item to change its section, its text, its kind of Answer (Yes / No / N.A., Text, Date, Policy text, Matrix row, or Risk question, where Yes needs a mitigation) and its order, or untick In use. A change applies to assessments started after it. Load the CanadaGAP templates the site doesn’t have adds any form the site is missing.

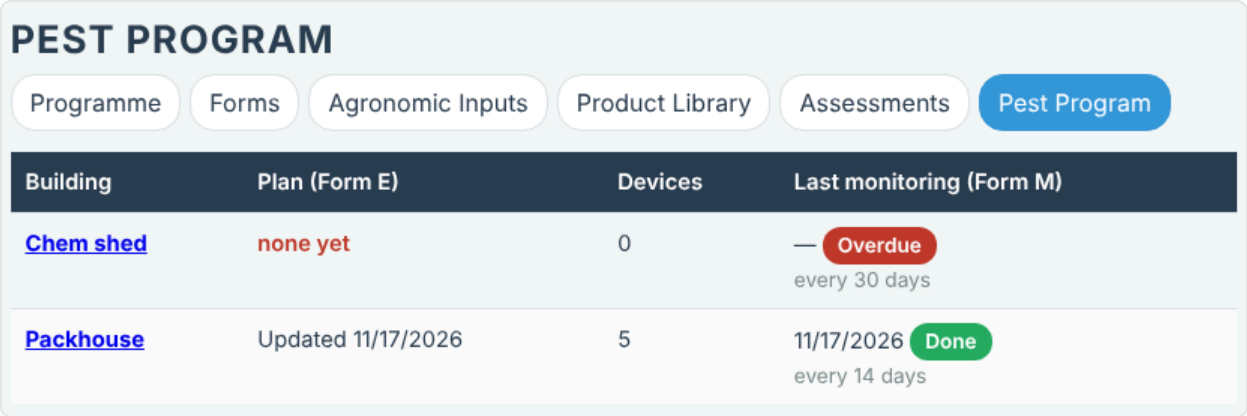


A template and its items

6.80 Pest Program

CanadaGAP > Pest Program keeps, for each building on the Programme's list (see 6.75), its pest control plan (Form E), its numbered devices and its monitoring rounds (Form M). A site whose pest control is kept in Continuum Pest Control or by a pest control company says so in the settings, and enters the date of the latest service report there instead.

Who	What they do
Quality Control Managers	Keep the plans and devices of their sites, record monitoring rounds and void a line recorded by mistake.
Users with the CanadaGAP Pest Program permission	Record monitoring rounds; they see the plan but don't change it.
The Food Safety app	Sends the rounds recorded in its Pest monitoring log (see 6.71).

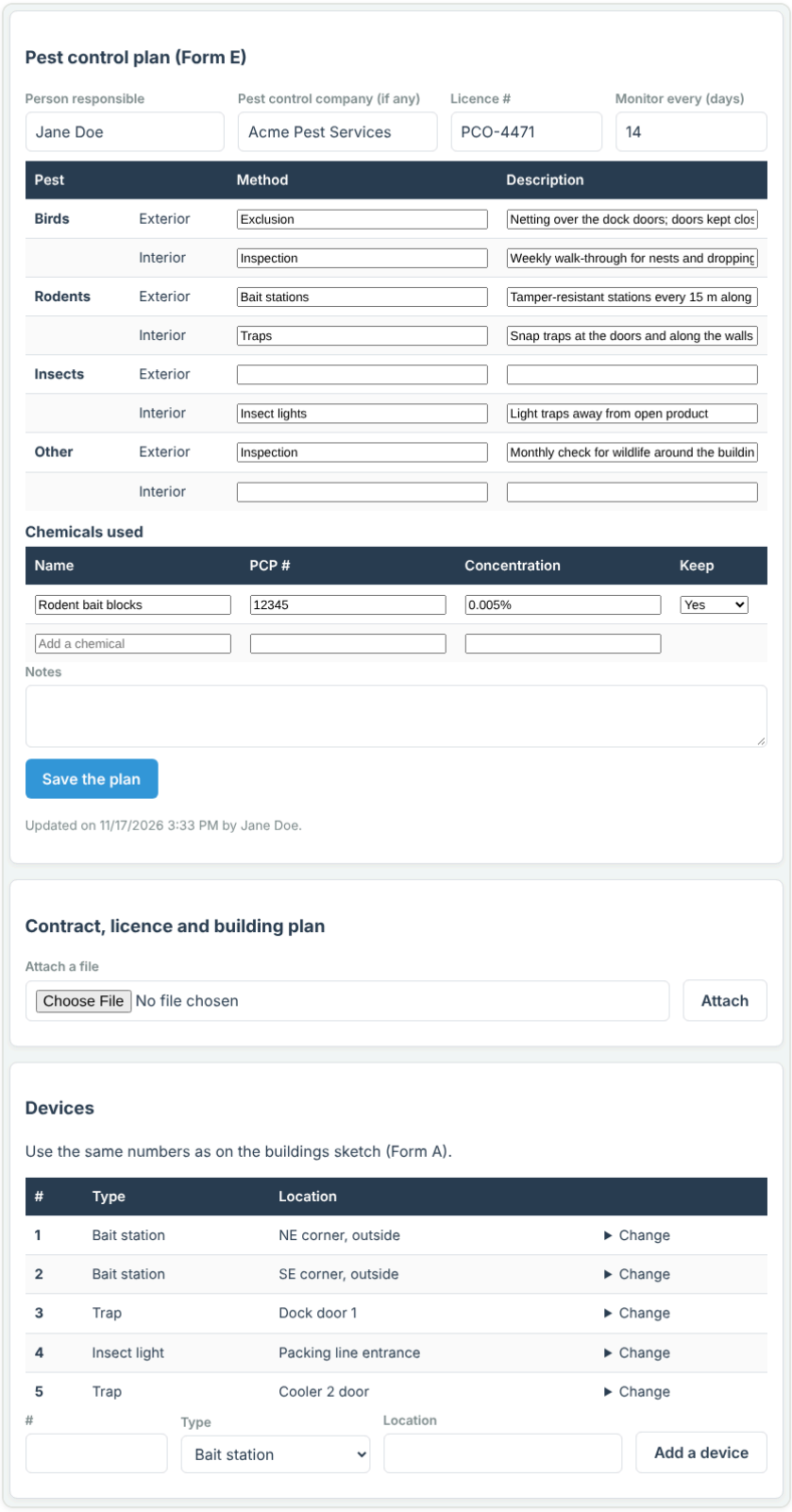


The buildings and their monitoring

THE PLAN AND THE DEVICES

Open a building. Under Pest control plan (Form E), type the Person responsible, the Pest control company (if any) and its Licence #, Monitor every (days), and for birds, rodents, insects and other pests, the Method and Description outside and inside; then the Chemicals used (name, PCP #, concentration) and Notes, and select Save the plan. Contract, licence and building plan keeps their files. Under

Devices, add each with the number on the buildings sketch (Form A), its Type (Bait station, Trap, Insect light, Glue board or Other) and its Location.

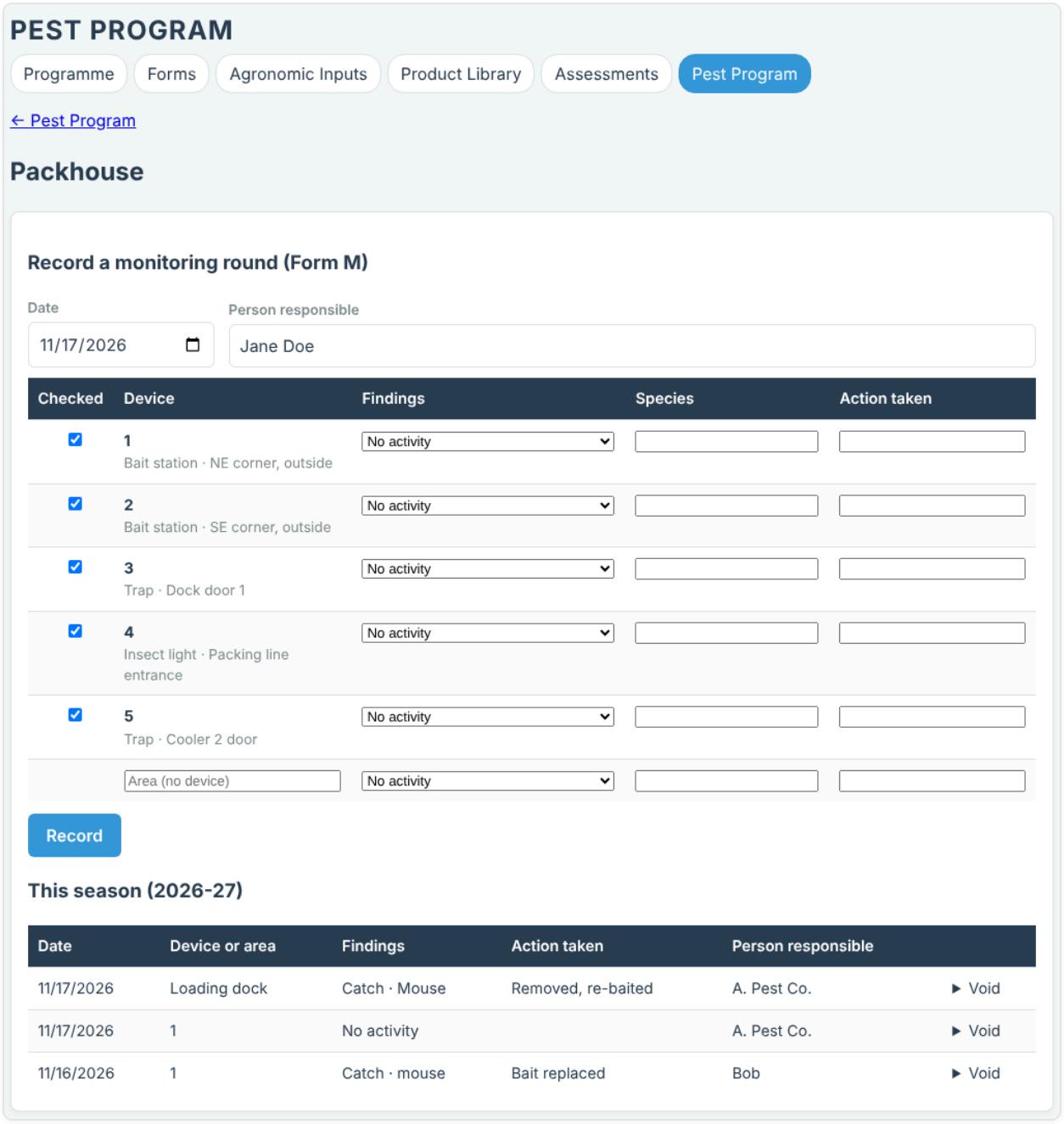


A building's plan and devices

RECORDING A MONITORING ROUND

1. Open the building. Under Record a monitoring round (Form M), enter the Date and the Person responsible.
2. Each device is ticked as Checked: choose its Findings (No activity; Activity (droppings, gnawing, tracks); Catch; Other (damaged or missing device…)), and type the Species and the Action taken. Untick a device that wasn’t checked.
3. For an area checked without a device, type the area in the last row.
4. Select Record.

A finding needs the action taken. This season lists the round’s lines with their findings, actions and person; Void takes out one recorded by mistake. On the Pest Program list, Last monitoring shows Overdue once a building goes longer than its days without a round.



Recording a monitoring round

Form E and Form M, at the bottom of the list, print the forms.

AT A SITE THAT FOLLOWS MEXICO

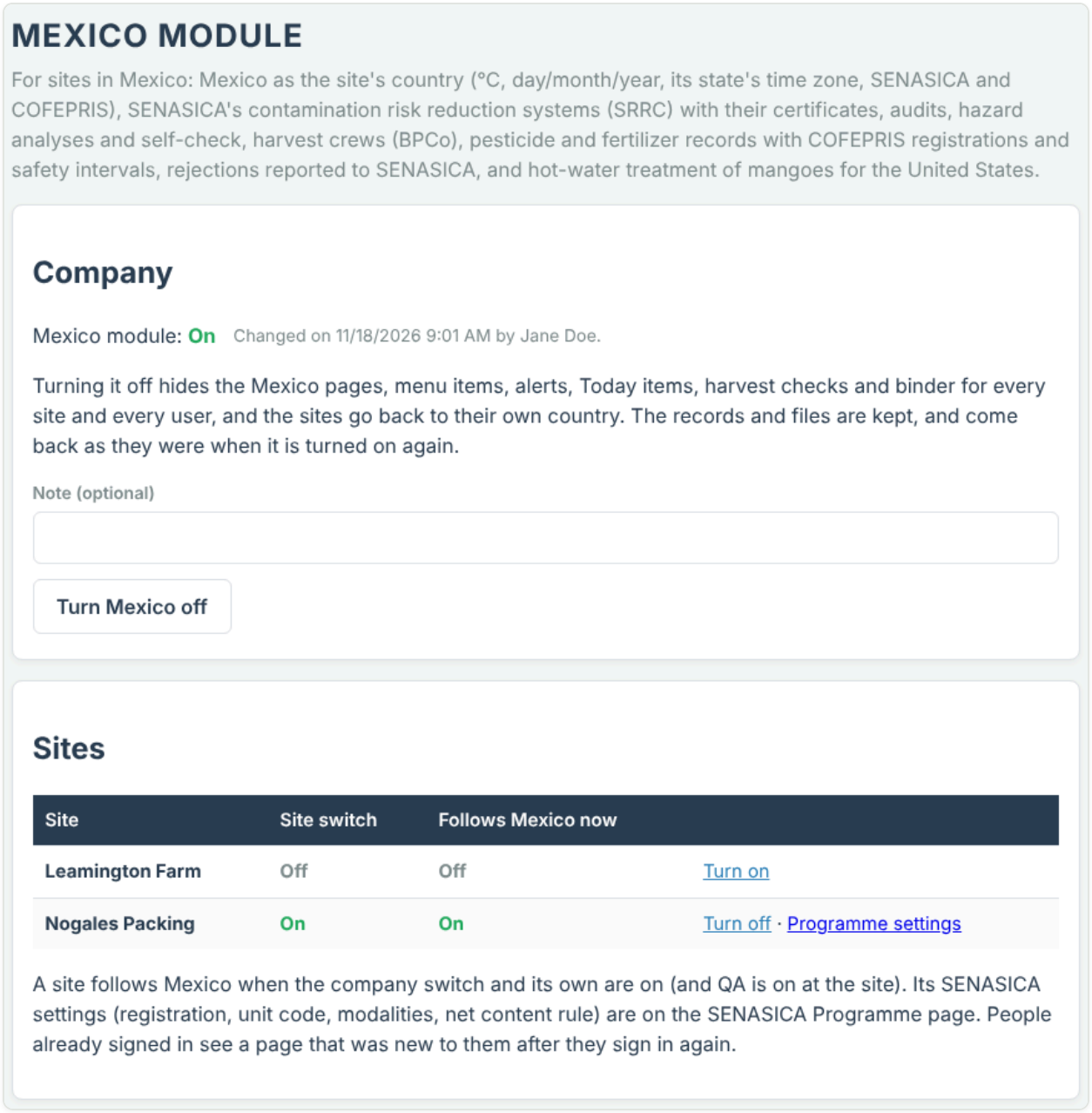
At a site that follows Mexico, the page is Mexico > Pest and Wildlife Control, for SRRC Module 4 (domestic and wild animals, and pests): the same plans, devices and monitoring rounds, kept per building of the SENASICA Programme's Buildings

and storages (see 6.82). The rounds count on the SENASICA Programme's readiness as the trap checks (Module 4).

6.81 Mexico Module

The Mexico module keeps in Continuum QA what a site in Mexico needs for SENASICA's contamination risk reduction systems (SRRC): the SENASICA Programme, with the site's registration, certificates and recognitions, audits, rejections reported to SENASICA, hazard analyses, the SRRC self-check and the evaluator's binder; the harvest crews (BPCo); the hot-water treatment of mangoes for the United States; and the pesticide and fertilizer records, with their COFEPRIS registrations and safety intervals. A site that follows Mexico also takes Mexico as its country on the other QA pages (see A Site That Follows Mexico, below). It is optional: Overview > Mexico Module turns it on or off for the company, and then for each site.

Who	What they do
Administrators, and Quality Control Managers of every site in use	Turn the module on or off for the company.
Quality Control Managers	Turn it on or off for their sites, while it is on for the company, and see the history of the switches.



The company switch and the site switches

TURNING IT ON

1. Go to Overview > Mexico Module.
2. Type a Note if you want, and select Turn Mexico on. Turning it on adds nothing to any site yet.
3. Under Sites, select Turn on beside each site in Mexico.

A site follows Mexico when the company switch and its own are on, and QA is on at the site. The first time a site is turned on, its hot-water dip times are loaded

(USDA APHIS schedule T102-a, see 6.84). Its SENASICA settings, such as its registration, unit code and modalities, are on the SENASICA Programme page (see 6.82): Programme settings opens them. People already signed in see the new pages after they sign in again.

> **Note:** The site's state, on Add / Change Sites (3.2 of the user manual), gives it its time zone. While it isn't a Mexican state, the site's row says Its state isn't a Mexican state: set it on Add / Change Sites for the time zone, and QA Setup lists it as a to-do (see 6.32).

TURNING IT OFF

Turn off beside a site, or Turn Mexico off for the company, hides Mexico at the site, or everywhere: the Mexico menu and its pages; the Mexico alerts, which clear at the next check; the harvest check in Mexico's words; the Mexico section of the Audit Pack and the Mexico items of QA Setup. The site goes back to its own country: the United States or Canada, as set on QA Setup or by its address. The pages Mexico shares with CanadaGAP stay while CanadaGAP is on at the site (see 6.74). Nothing is deleted: turned on again, everything is back as it was.

> **Note:** The Mexico Module page itself is never hidden, so the module can always be turned on again. History lists every switch with when, who and the note.

THE MEXICO MENU

At a site that follows Mexico, the QA menu bar has a Mexico menu, between CanadaGAP and Management. Three of its pages are the CanadaGAP pages for agronomic inputs, products and pests, shown in Mexico's words at a Mexican site; each Mexico page also has tabs at the top to go to the others.

Page	What it keeps
SENASICA Programme (SRRC)	Where the site stands this cycle, its settings, certificates and recognitions, audits, rejections, hazard analyses, buildings, the SRRC self-check and the evaluator’s binder (see 6.82).
Pesticide and Fertilizer Applications	The applications of pesticides and fertilizers to each field, with the COFEPRIS registration and the safety interval: the Agronomic Inputs page (see 6.77).
Input Products and Receipts	The products with their COFEPRIS registration and safety interval, and the inputs received: the Input Product Library (see 6.78).
Harvest Crews	The crews and their providers (BPCo), the check of a crew before it harvests, and the crews’ hand and container analyses (see 6.83).
Hot-Water Treatment	The hot-water runs of mangoes for the United States, judged against the dip times (see 6.84).
Pest and Wildlife Control	Each building’s pest and wildlife control plan and its trap checks: the Pest Program page (see 6.80).

A SITE THAT FOLLOWS MEXICO

While a site follows Mexico, it is a Mexican site for the other QA pages: dates day/month/year, °C, its state’s time zone, SENASICA and COFEPRIS where the regulator is named. Where the rules differ:

Page	At a site that follows Mexico
Net Weight Checks (6.47)	The tolerances of NOM-002-SCFI-2011, packs in g or kg, when the SENASICA Programme’s settings say For Mexico; else NIST Handbook 133 for packing to the United States (the setting to start with).

Page	At a site that follows Mexico
Recalls (6.39)	SENASICA first among the agencies (the FDA is still offered), and the regulator told the same day, for every recall.
Cold Chain (6.34), Load Inspections (6.44)	°C to start with (a site with saved settings keeps them), and a reefer tolerance of 1 °C.
Sanitation (6.41), Wash Water (6.43)	COFEPRIS registration (or EPA Reg. No.) for the chemicals.
Grower Certificates (6.15)	The type SENASICA SRRC, offered first; SRRC or SENASICA typed for Other is recognized.
External Audits (6.30)	SENASICA SRRC first among the programs, then the export schemes and México Calidad Suprema.
Approved Suppliers (6.45)	Starter categories with the COFEPRIS registration and the EMA accreditation.
Lab Results (6.38)	Usual markets: the United States, Mexico (the residue limits of the COFEPRIS registration) and Canada.
Water Testing (6.49)	No plate count limit to start with (NOM-127 sets none).
Visitors and Contractors (6.51)	The privacy notice on, and the health answers cleared after 12 months (LFPDPPP).

Note: The module supports the SRRC records; the certificate comes from SENASICA, after the third-party evaluator's conformity evaluation. The self-check's points are Continuum's wording of the SRRC modules: check them against the current SENASICA documents and your SRRC professional before relying on them for an evaluation.

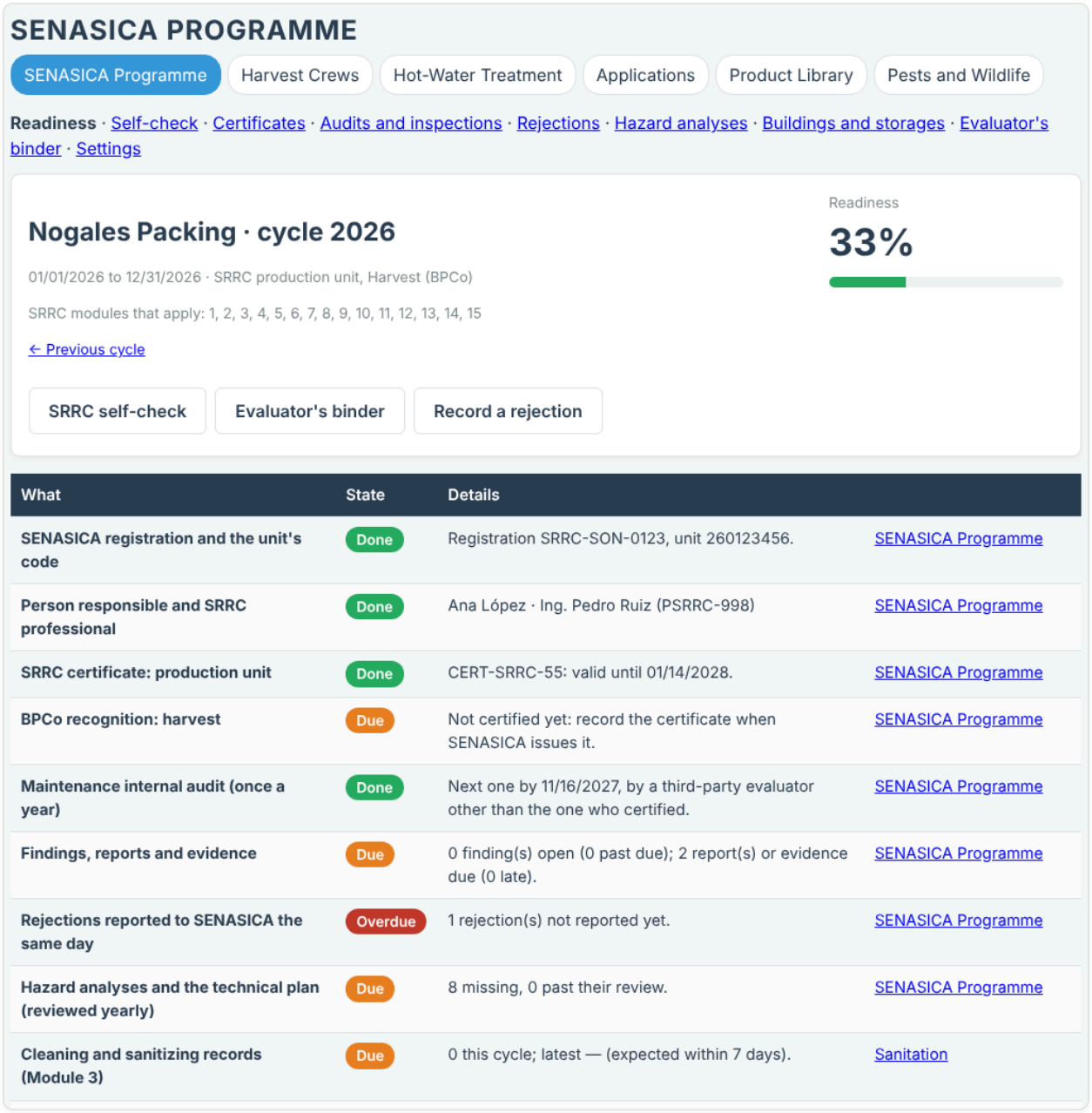
6.82 SENASICA Programme

Mexico > SENASICA Programme (SRRC) shows where a site that follows Mexico stands this cycle against SENASICA's contamination risk reduction systems: each requirement that applies to the site's modalities, whether it is done, and what is missing. From there the site keeps its settings, certificates and recognitions, audits, rejections, hazard analyses and buildings, answers the SRRC self-check and prints the evaluator's binder. The links under the tabs open each part: Readiness, Self-check, Certificates, Audits and inspections, Rejections, Hazard analyses, Buildings and storages, Evaluator's binder and Settings.

Who	What they do
Everyone with the page	Sees everything; records rejections and when SENASICA was told; closes findings with their evidence; answers the self-check; adds files.
Quality Control Managers of the site, and Administrators	Also change the settings, certificates and recognitions, audits and findings, hazard analyses and buildings, and void records.

READINESS

The cycle runs for a year from the day set in the settings (January 1 to start with); ← Previous cycle shows the one before. Readiness is the share of the requirements that apply to the site that are done. Each row is a requirement with its state, Done, Due or Overdue, the details (what is on file, or what is missing) and the page that keeps it: the SENASICA Programme itself, or the QA page where the record is kept, such as Sanitation (Module 3), Pest and Wildlife Control (Module 4), Employee Training (Module 5), Water Testing (Modules 7 and 10), Lab Results and Environmental Monitoring (Module 7), Mock Recalls (Module 8), Pesticide and Fertilizer Applications and the inputs received (Modules 8, 11 and 12), Calibration Records (the sprayers), Harvest Crews (Modules 7 and 13) and Wash Water (Module 14).



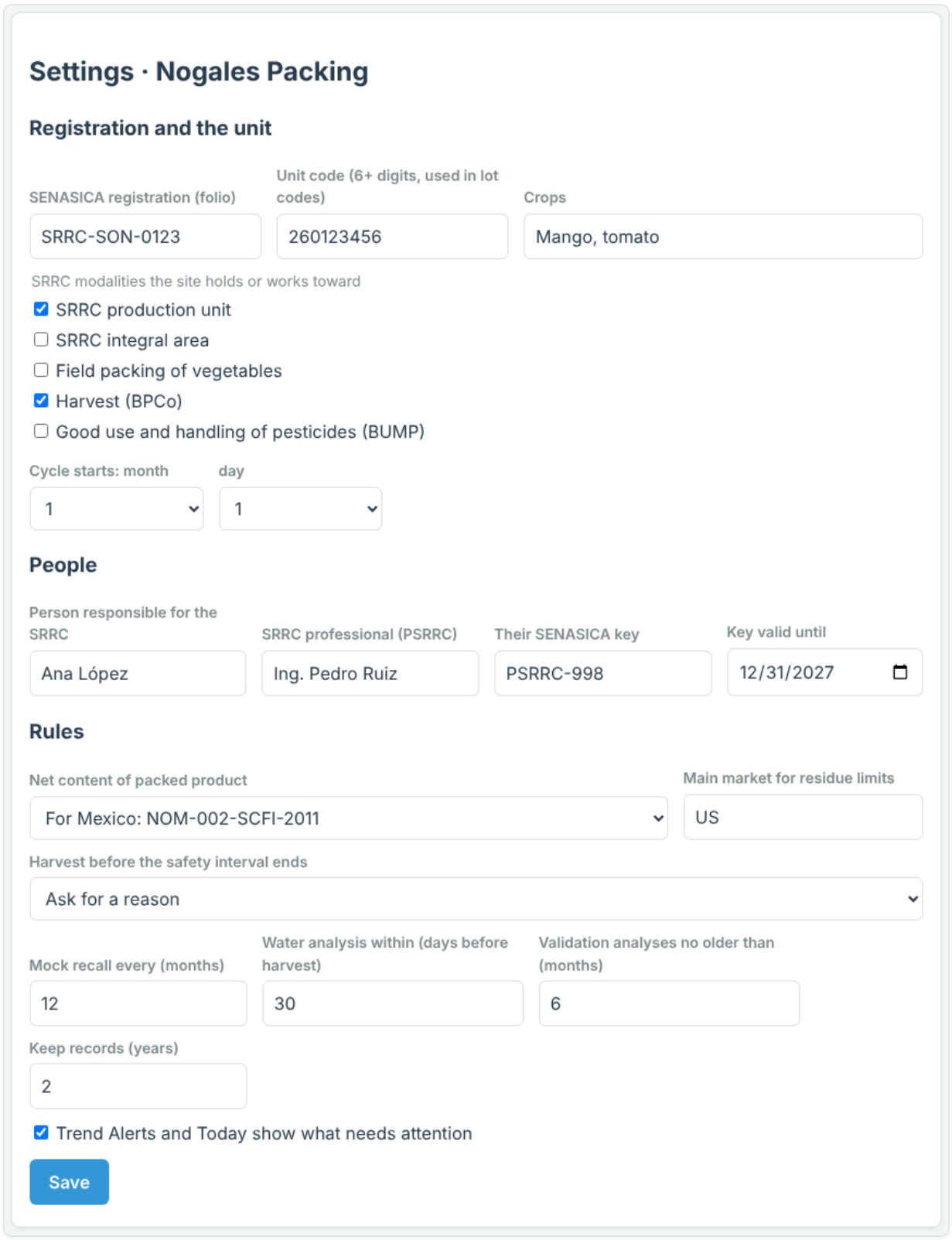
Readiness of the cycle, with the page that keeps each requirement

SRRC self-check, Evaluator’s binder and Record a rejection, above the table, open those parts. With the setting Trend Alerts and Today show what needs attention, a requirement that is overdue (and a certificate, audit or finding that is due) is also a Trend Alert of the site and is on Today (see 6.13 and 6.60).

SETTINGS

A Quality Control Manager of the site selects Settings and fills in:

- Registration and the unit: the SENASICA registration (folio), the Unit code (6 or more digits, used in lot codes) and the Crops.
- SRRC modalities the site holds or works toward: SRRC production unit, SRRC integral area, Field packing of vegetables, Harvest (BPCo) and Good use and handling of pesticides (BUMP). The modalities decide which of the 15 SRRC modules apply, and so which requirements, self-check points and hazard analyses are asked for.
- Cycle starts: the month and day.
- People: the Person responsible for the SRRC, and the SRRC professional (PSRRC) with their SENASICA key and the date it is valid until.
- Rules: Net content of packed product, For the United States: NIST Handbook 133 (to start with) or For Mexico: NOM-002-SCFI-2011 (see 6.47); the Main market for residue limits; Harvest before the safety interval ends, Ask for a reason (to start with) or Refuse it (see 6.83); Mock recall every (months) (12); Water analysis within (days before harvest) (30); Validation analyses no older than (months) (6); Keep records (years) (2); and Trend Alerts and Today show what needs attention.

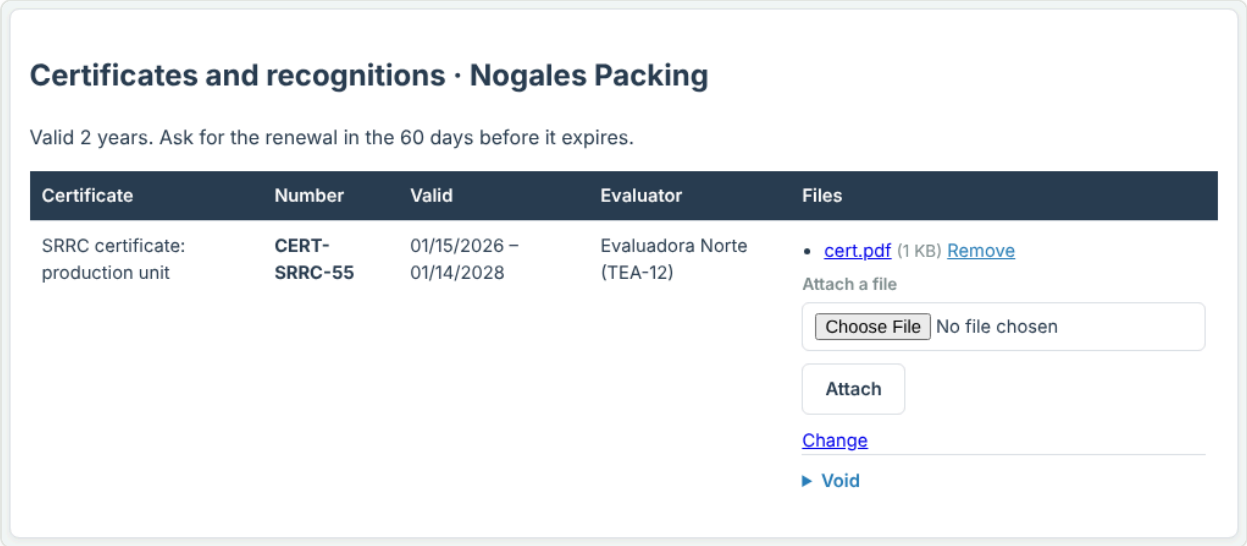


The site's SENASICA settings

CERTIFICATES AND RECOGNITIONS

Certificates keeps the site's SRRC certificates and SENASICA's recognitions, each with its file. A certificate is valid for 2 years: ask for the renewal in the 60 days before it expires; the requirement is Due from then, and Overdue once it has expired.

1. Select Certificates, then, under Add a certificate or recognition, choose what it is For: SRRC certificate: production unit, SRRC certificate: integral area, SRRC recognition: field packing, BPCo recognition: harvest, or BUMP recognition: pesticides.
2. Enter the Number, the date it was Issued on and, if it isn't 2 years, Valid until.
3. Enter the Third-party evaluator (TEA) who evaluated and Their key, a Note if you want, choose the certificate's file (PDF or picture), and select Save.

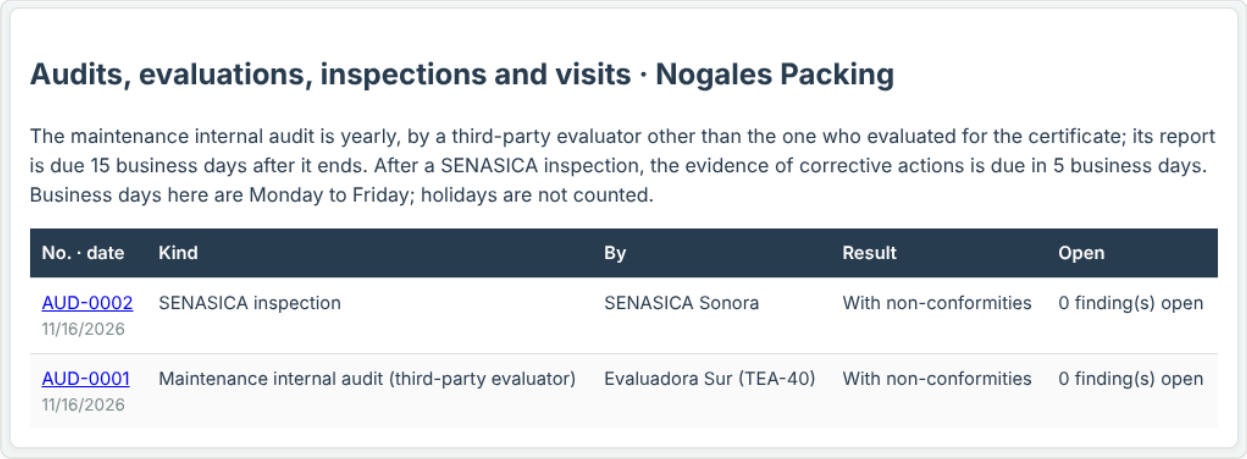


A certificate on file, and adding one

AUDITS, INSPECTIONS AND VISITS

Audits and inspections keeps every audit, evaluation, inspection and visit of the unit, with its report and findings. Record one with its Kind: Initial internal audit (SRRC professional), Conformity evaluation (third-party evaluator), Maintenance internal audit (third-party evaluator), SENASICA inspection, Renewal evaluation (third-party evaluator) or Technical visit of the SRRC professional; the Date, and when it Ended if later; By (the PSRRC, TEA or SENASICA officer) and Their key;

the Result (Not yet, Favourable, no findings, With non-conformities or Not favourable); For the certificate; a Note; and the report.



Audits, evaluations, inspections and visits · Nogales Packing

The maintenance internal audit is yearly, by a third-party evaluator other than the one who evaluated for the certificate; its report is due 15 business days after it ends. After a SENASICA inspection, the evidence of corrective actions is due in 5 business days. Business days here are Monday to Friday; holidays are not counted.

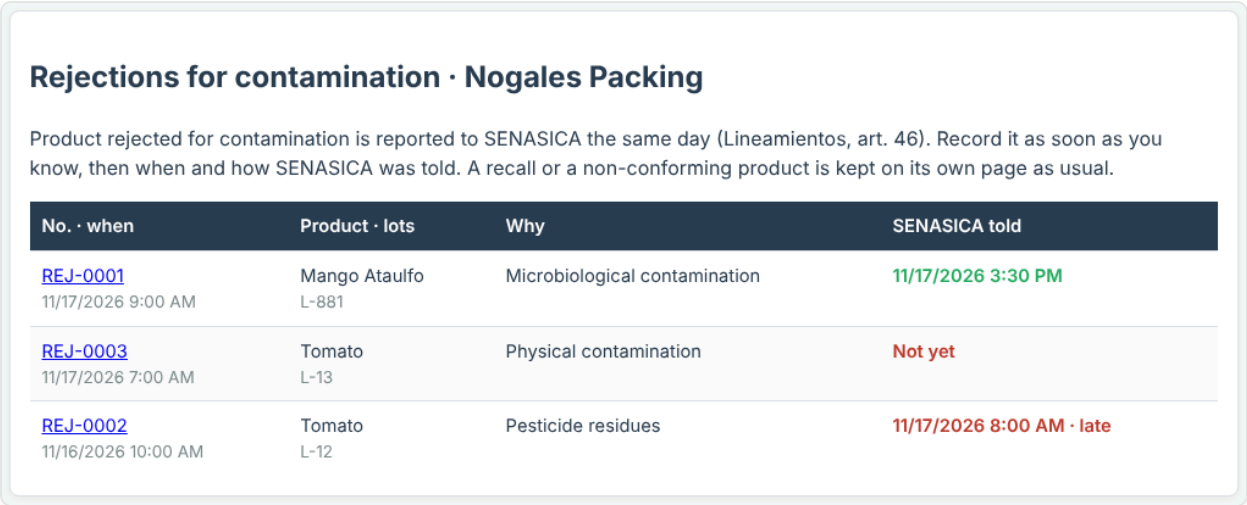
No. · date	Kind	By	Result	Open
AUD-0002 11/16/2026	SENASICA inspection	SENASICA Sonora	With non-conformities	0 finding(s) open
AUD-0001 11/16/2026	Maintenance internal audit (third-party evaluator)	Evaluadora Sur (TEA-40)	With non-conformities	0 finding(s) open

The audits and inspections of the unit

The due dates are set from the kind: the report of a maintenance internal audit, 15 business days after it ends; the evidence of the corrective actions after a SENASICA inspection with non-conformities, 5 business days. Business days are Monday to Friday; holidays aren't counted, so change a due date on the audit when it differs. The maintenance internal audit is yearly, by a third-party evaluator other than the one who evaluated for the certificate: one by the same evaluator is refused. Open an audit to add its findings; each finding is closed with its evidence, and Findings, reports and evidence stays Due until every one is.

REJECTIONS

Product rejected for contamination is reported to SENASICA the same day. Select Record a rejection as soon as you know, with when you Learned of it, Where (a border crossing, a customer, an inspection), the Product and its Lot(s), Why (microbiological contamination, pesticide residues, heavy metals, physical contamination or other) and What was found. Then tick SENASICA has been told and enter when (Told on, at), How (email, phone, platform), the Folio or reference, What was done with the product, and the rejection notice or the lab report.



Rejections for contamination · Nogales Packing

Product rejected for contamination is reported to SENASICA the same day (Lineamientos, art. 46). Record it as soon as you know, then when and how SENASICA was told. A recall or a non-conforming product is kept on its own page as usual.

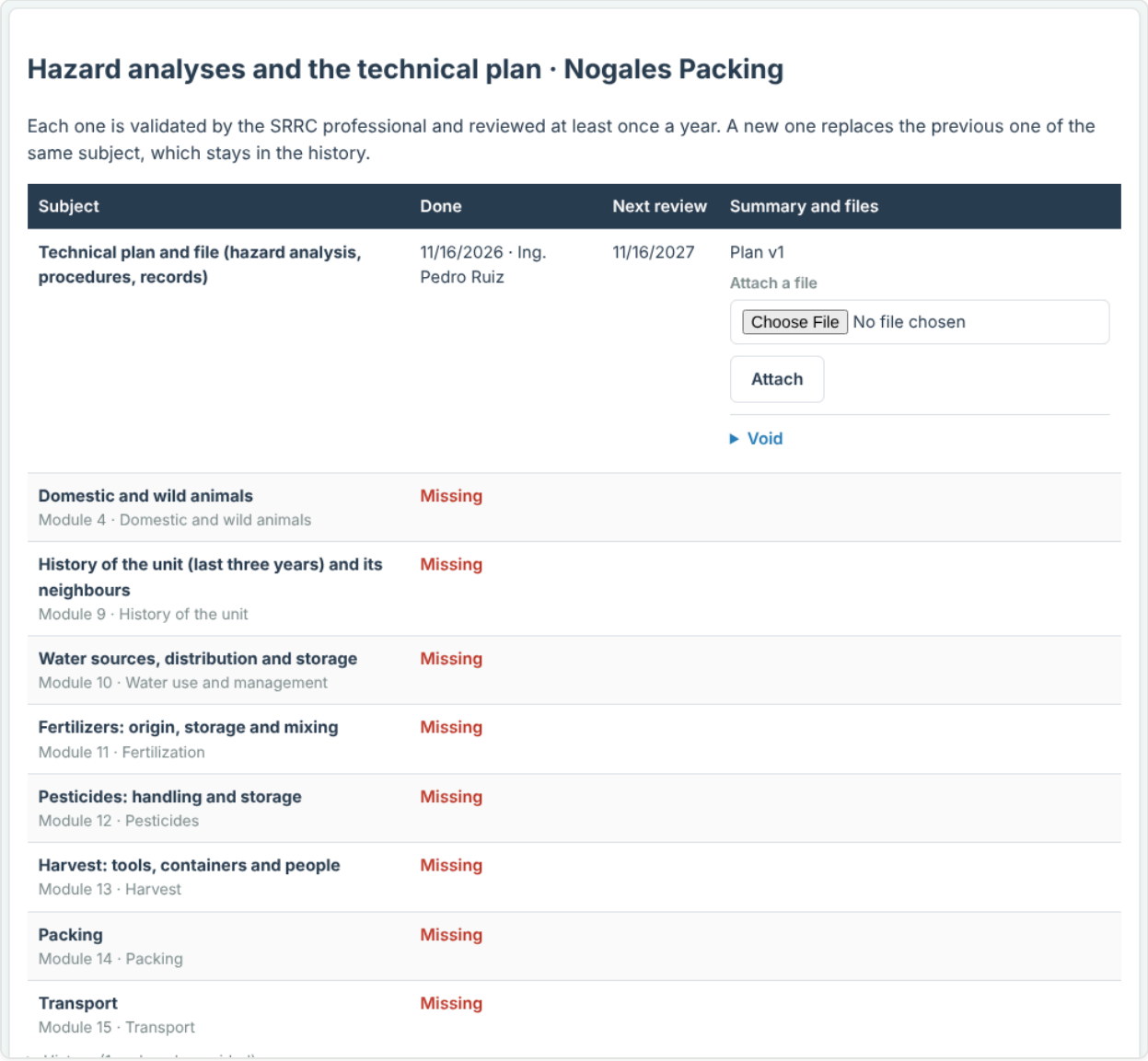
No. · when	Product · lots	Why	SENASICA told
REJ-0001 11/17/2026 9:00 AM	Mango Ataulfo L-881	Microbiological contamination	11/17/2026 3:30 PM
REJ-0003 11/17/2026 7:00 AM	Tomato L-13	Physical contamination	Not yet
REJ-0002 11/16/2026 10:00 AM	Tomato L-12	Pesticide residues	11/17/2026 8:00 AM · late

Rejections and when SENASICA was told

A rejection told a day later shows late; one not told yet keeps Rejections reported to SENASICA the same day Overdue, and is a Trend Alert. A recall or non-conforming product is still kept on its own page (see 6.39 and 6.35).

HAZARD ANALYSES AND THE TECHNICAL PLAN

Hazard analyses keeps the technical plan and file, and the hazard analysis of each subject the site's modalities ask for: domestic and wild animals (Module 4), the history of the unit and its neighbours (Module 9), water sources (Module 10), fertilizers (Module 11), pesticides (Module 12), harvest (Module 13), packing (Module 14) and transport (Module 15). Each one is validated by the SRRC professional and reviewed at least once a year: record it with the Subject, Done on, Next review (blank: a year), Done or validated by, the hazards found and how they are controlled, and the document.

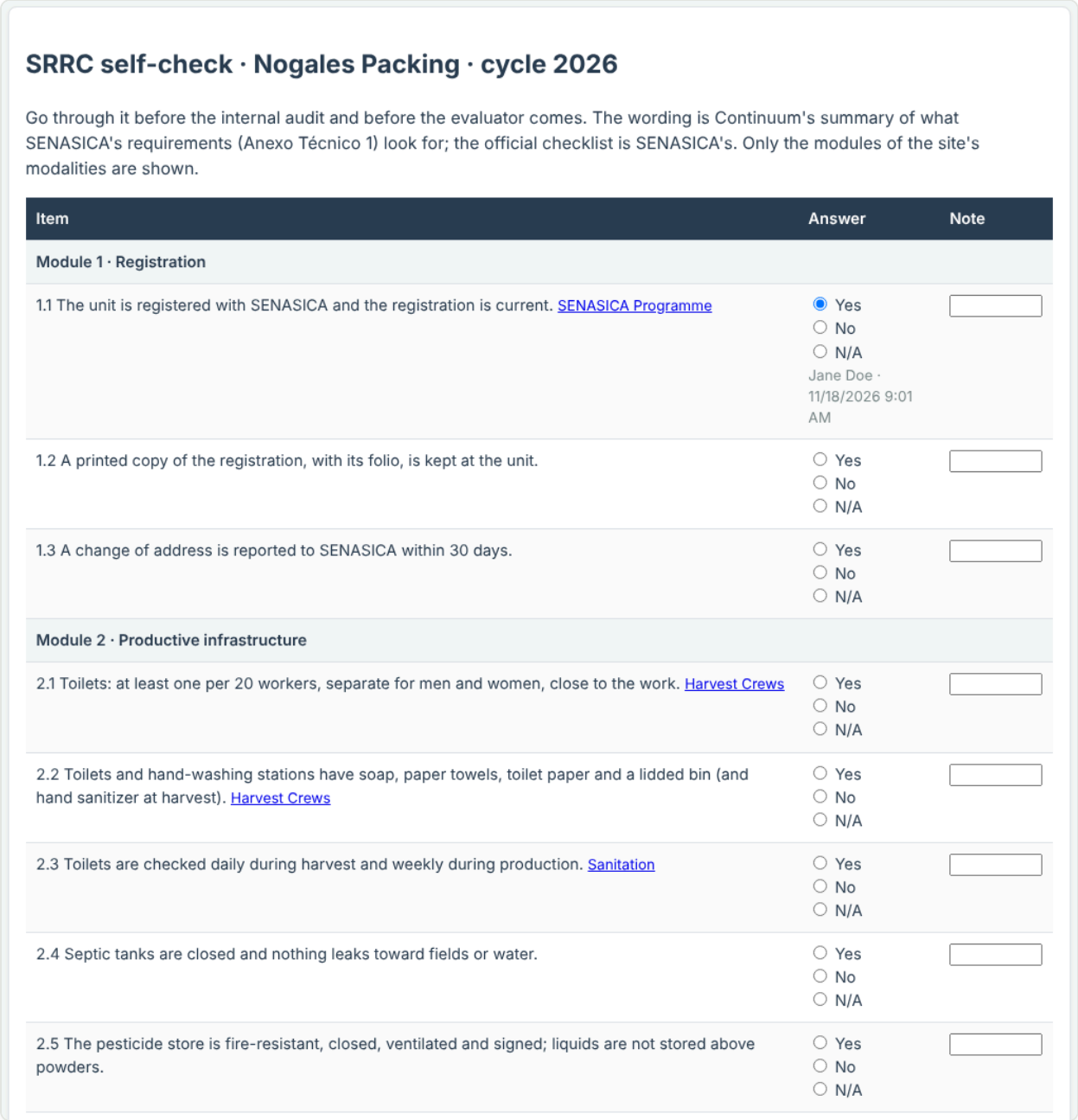


The hazard analyses in force, and those missing

A new analysis of a subject replaces the one before, which stays in the History; voiding the new one brings the one before back.

THE SRRC SELF-CHECK

SRRC self-check is the list of what SENASICA's requirements look for, module by module, about 75 points in all; only the modules of the site's modalities are shown. Go through it before the internal audit and before the evaluator comes: answer each point Yes, No or N/A, with a note if you want; each answer keeps who gave it and when. The answers are per cycle, and Readiness counts how many are answered.



SRRC self-check · Nogales Packing · cycle 2026

Go through it before the internal audit and before the evaluator comes. The wording is Continuum's summary of what SENASICA's requirements (Anexo Técnico 1) look for; the official checklist is SENASICA's. Only the modules of the site's modalities are shown.

Item	Answer	Note
Module 1 · Registration		
1.1 The unit is registered with SENASICA and the registration is current. SENASICA Programme	(•) Yes ( ) No ( ) N/A Jane Doe · 11/18/2026 9:01 AM	
1.2 A printed copy of the registration, with its folio, is kept at the unit.	( ) Yes ( ) No ( ) N/A	
1.3 A change of address is reported to SENASICA within 30 days.	( ) Yes ( ) No ( ) N/A	
Module 2 · Productive infrastructure		
2.1 Toilets: at least one per 20 workers, separate for men and women, close to the work. Harvest Crews	( ) Yes ( ) No ( ) N/A	
2.2 Toilets and hand-washing stations have soap, paper towels, toilet paper and a lidded bin (and hand sanitizer at harvest). Harvest Crews	( ) Yes ( ) No ( ) N/A	
2.3 Toilets are checked daily during harvest and weekly during production. Sanitation	( ) Yes ( ) No ( ) N/A	
2.4 Septic tanks are closed and nothing leaks toward fields or water.	( ) Yes ( ) No ( ) N/A	
2.5 The pesticide store is fire-resistant, closed, ventilated and signed; liquids are not stored above powders.	( ) Yes ( ) No ( ) N/A	

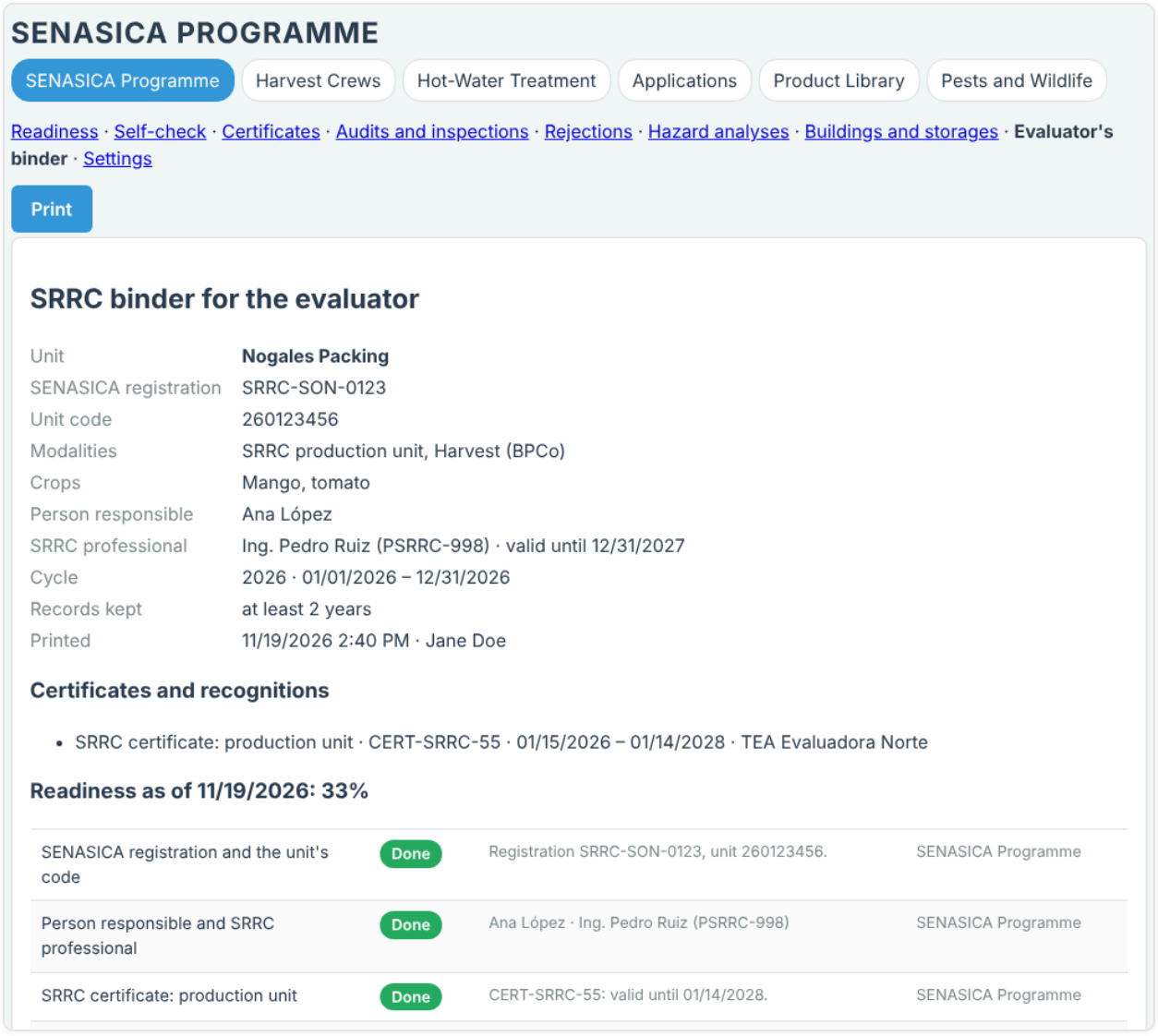
The SRRC self-check, module by module

BUILDINGS AND STORAGES

Buildings and storages lists the site’s buildings, storages and agricultural chemical storages, with whether each is in use. The pest and wildlife control plans and trap checks are kept per building, on Pest and Wildlife Control (see 6.80). At a site that also follows CanadaGAP, it is the same list as CanadaGAP’s buildings and storages (see 6.75).

THE EVALUATOR'S BINDER

Evaluator's binder puts on one page what the third-party evaluator or SENASICA asks to see: the unit (registration, unit code, modalities, crops, the person responsible and the SRRC professional), the cycle, the certificates and recognitions, and the readiness, with each requirement, its state and the page where its records are kept. Select Print or save as PDF. The Audit Pack's Mexico section has the records themselves (see 6.17).



The evaluator's binder

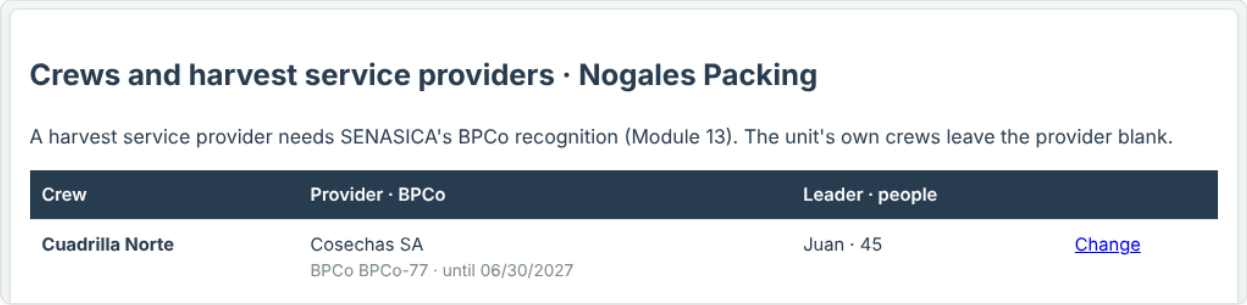
6.83 Harvest Crews

Mexico > Harvest Crews keeps the harvest part of the SRRC (Module 13, BPCo) and the crews' part of Module 7: the crews and their harvest service providers, the check of a crew before each harvest, and the crews' hand and container analyses. Checks are numbered CC-.

Who	What they do
Everyone with the page	Records the checks and analyses, and adds files.
Quality Control Managers of the site	Also keep the crews and void records.

CREWS AND HARVEST SERVICE PROVIDERS

Select Crews and providers to keep the site's crews: the Name, the Harvest service provider (blank for the unit's own crews), the Crew leader, the number of People, the provider's BPCo recognition number and the date it is Valid until, In use, and a Note. A harvest service provider needs SENASICA's BPCo recognition (Module 13).

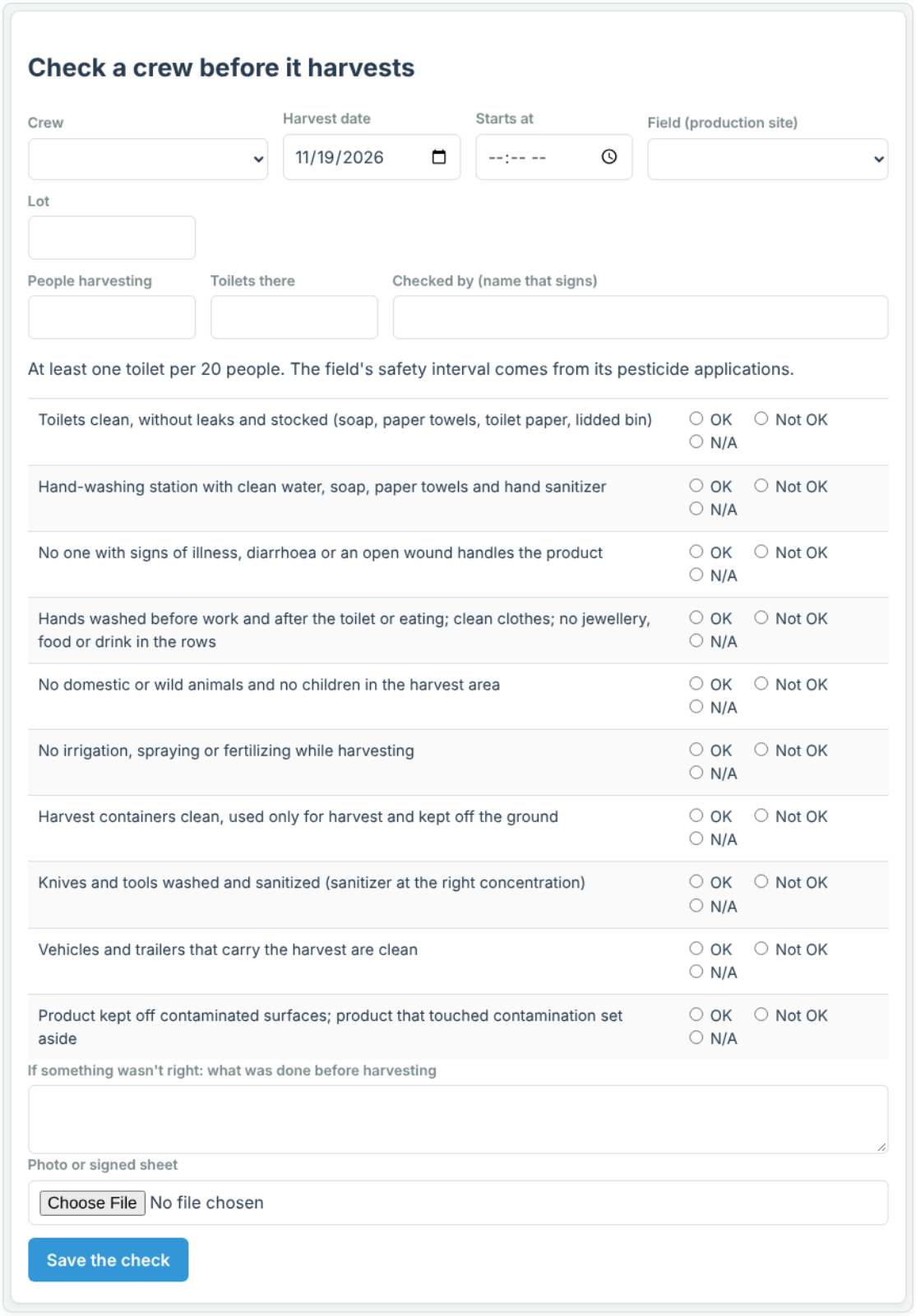


A crew and its provider's BPCo recognition

CHECKING A CREW BEFORE IT HARVESTS

1. Go to Mexico > Harvest Crews. Under Check a crew before it harvests, choose the Crew, and enter the Harvest date, when it Starts at, the Field (production site) and the Lot.
2. Enter the People harvesting and the Toilets there: at least one toilet per 20 people.

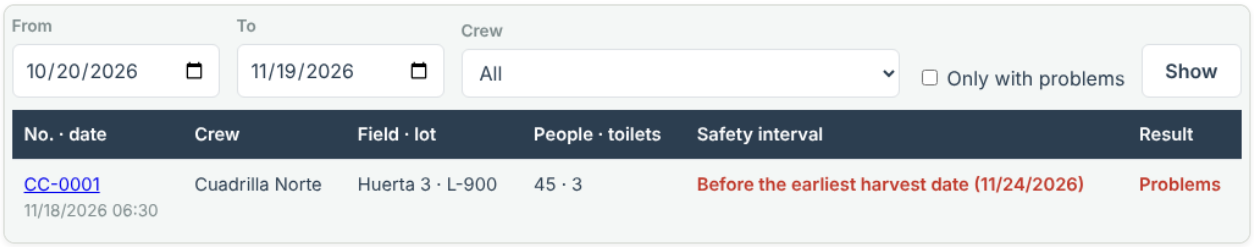
3. Answer each point OK, Not OK or N/A: the toilets; the hand-washing station; no one ill or with an open wound handling the product; the crew’s hygiene; no animals or children; no irrigation, spraying or fertilizing while harvesting; the harvest containers; the knives and tools; the vehicles; and the product kept off contaminated surfaces.
4. If something wasn’t right, type what was done before harvesting. Enter Checked by (the name that signs), attach a photo or the signed sheet if you want, and select Save the check.



The check of a crew before it harvests

The field's safety interval comes from its pesticide applications (see 6.77). A harvest before the field's earliest harvest date needs what was done, and is kept

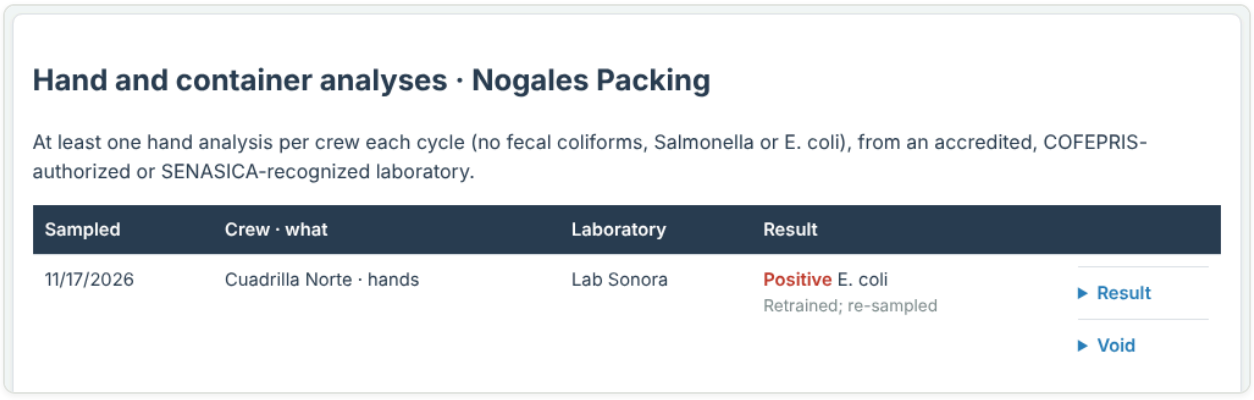
with the harvests within the safety interval on Pesticide and Fertilizer Applications; when the site's settings say Refuse it, the check isn't saved (see 6.82). Too few toilets, or a point Not OK, makes the check's result Problems. From, To, Crew and Only with problems choose the checks listed, and Print the log prints them.



The crew checks

HAND AND CONTAINER ANALYSES

Each crew needs at least one hand analysis each cycle (no fecal coliforms, Salmonella or E. coli), from an accredited, COFEPRIS-authorized or SENASICA-recognized laboratory. Select Hand and container analyses, then under Record an analysis choose the Crew and what it is Of (Hands, or Containers and tools), and enter the date Sampled on, the Laboratory and the Lab reference. Choose the Result, Waiting for the lab, Negative (meets) or Positive (fails), with what was found and the action taken, attach the lab report, and select Save. A result waiting for the lab is completed later from its row.



The crews' analyses

6.84 Hot-Water Treatment

Mexico > Hot-Water Treatment keeps the hot-water immersion of mangoes for export to the United States (USDA APHIS PPQ Treatment Manual, schedule T102-a, Mexico and Central America). Each run is judged against the site's dip times as it is recorded; a run that doesn't meet them asks what was done. Runs are numbered HW-.

Who	What they do
Everyone with the page	Records the runs and adds files, such as the recorder's chart.
Quality Control Managers of the site	Also keep the tanks and the dip times, and void runs.

TANKS AND DIP TIMES

Select Tanks to add each tank with its recorder and probes and its instrument number in Calibration Records (see 6.12). Dip times shows the dip times by the fruit's shape and weight, loaded from T102-a the first time the site was turned on: for rounded fruit (Tommy Atkins, Kent, Haden, Keitt), 75 minutes up to 500 g, 90 up to 700 g and 110 up to 900 g; for flat or elongated fruit (Ataulfo, Manila, Carabao, Irwin…), 65 minutes up to 375 g and 75 up to 570 g; each with the minutes the water may be between 45.4 and 46.1 °C (10 or 15).

Dip times · Nogales Packing

Seeded from USDA APHIS PPQ Treatment Manual schedule T102-a (Mexico and Central America). Check them against the current manual and the season's work plan; a QC Manager changes them when they change.

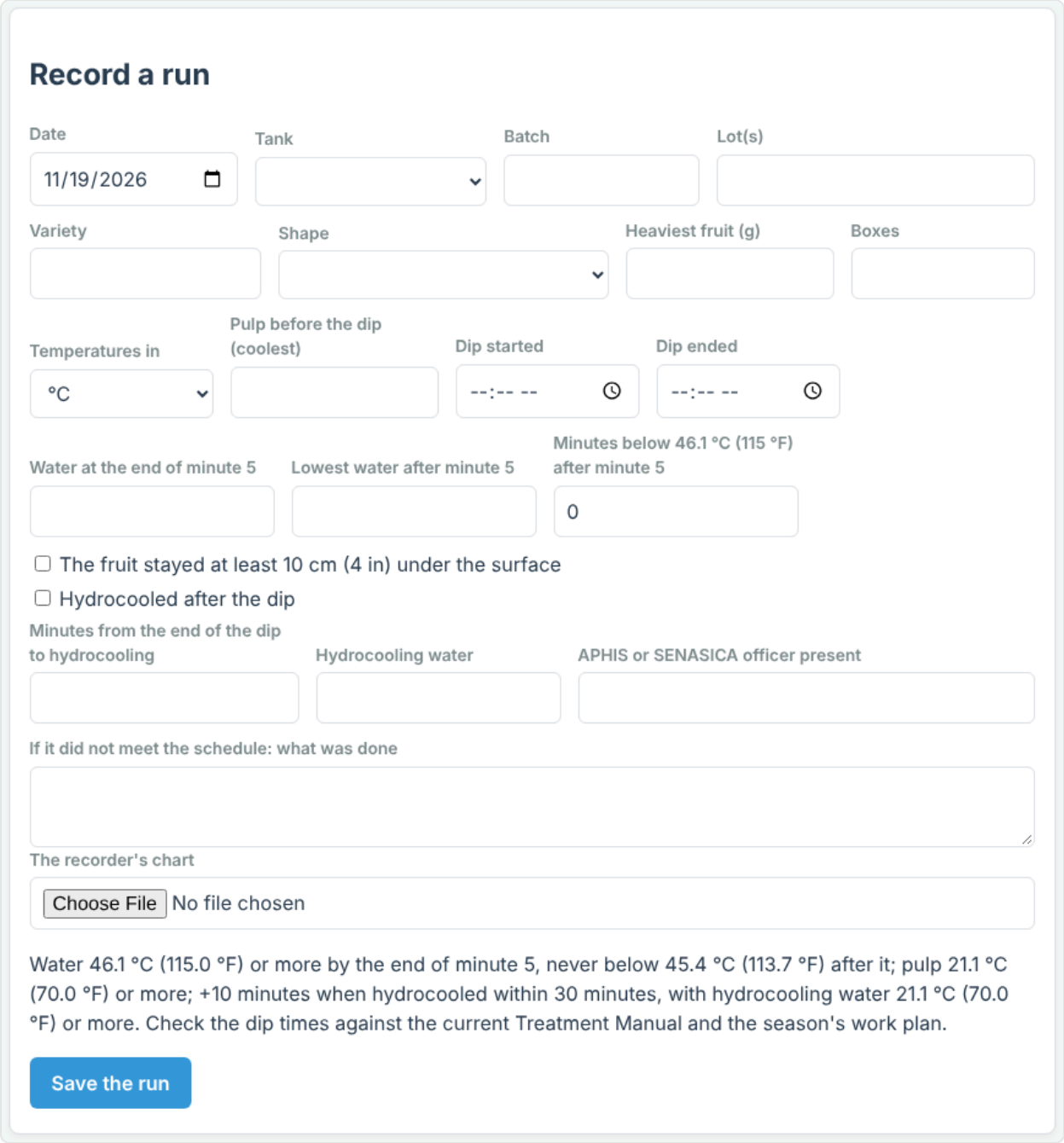
Shape	Up to	Minutes	Minutes allowed at 45.4-46.1 °C	
Rounded (Tommy Atkins, Kent, Haden, Keitt)	500 g	75	10	▸ Change
Rounded (Tommy Atkins, Kent, Haden, Keitt)	700 g	90	15	▸ Change
Rounded (Tommy Atkins, Kent, Haden, Keitt)	900 g	110	15	▸ Change
Flat or elongated (Ataulfo, Manila, Carabao, Irwin…)	375 g	65	10	▸ Change
Flat or elongated (Ataulfo, Manila, Carabao, Irwin…)	570 g	75	10	▸ Change

The dip times, from T102-a

> **Note:** Check the dip times against the current Treatment Manual and the season’s work plan: a Quality Control Manager changes them (Change on a row) when they change.

RECORDING A RUN

1. Go to Mexico > Hot-Water Treatment. Under Record a run, enter the Date, choose the Tank, and enter the Batch, the Lot(s), the Variety, the Shape, the Heaviest fruit (g) and the Boxes.
2. Choose whether the Temperatures are in °C or °F, and enter the Pulp before the dip (the coolest), when the Dip started and ended, the Water at the end of minute 5, the Lowest water after minute 5 and the Minutes below 46.1 °C (115 °F) after minute 5.
3. Tick The fruit stayed at least 10 cm (4 in) under the surface, and Hydrocooled after the dip when it was, with the Minutes from the end of the dip to hydrocooling and the Hydrocooling water.
4. Enter the APHIS or SENASICA officer present, attach the recorder’s chart, and select Save the run. If the run doesn’t meet the schedule, type what was done first.



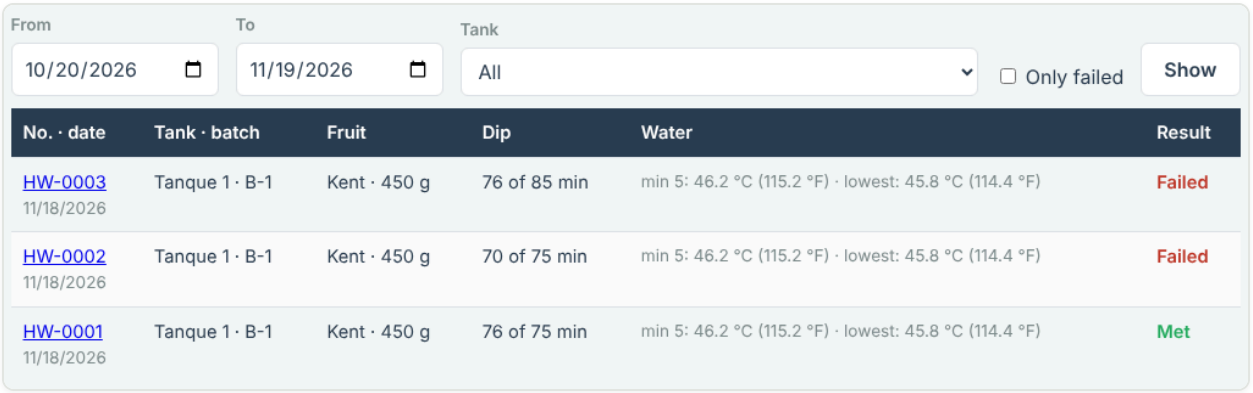
Recording a hot-water run

HOW A RUN IS JUDGED

What	It meets the schedule when
Dip time	At least the schedule's minutes for the fruit's shape and its heaviest fruit; 10 minutes more when the fruit is hydrocooled within 30 minutes of the end of the dip.

What	It meets the schedule when
Water by the end of minute 5	46.1 °C (115 °F) or more.
Water after minute 5	Never below 45.4 °C (113.7 °F), and below 46.1 °C for no longer than the schedule's minutes (10 or 15).
Pulp before the dip	21.1 °C (70 °F) or more.
The fruit under water	At least 10 cm (4 in) under the surface.
Hydrocooling water	21.1 °C (70 °F) or more.

Temperatures typed in °F are kept in °C, and shown in both. The list shows each run with its tank and batch, the fruit, the dip (minutes, of those needed), the water and Met or Failed; From, To, Tank and Only failed choose the runs, and Print the log prints them.



The hot-water runs, met or failed

7. Troubleshooting

7.3 Setup and Data Entry Errors

Symptom	Likely Cause	Fix
The QA menus aren't there (no ⇄ QA switch)	The site the menus are for doesn't have QA, or its QA has ended; or the User has no permission for a QA page	Select ⇄ QA right of Continuum QC (A.2). Without the switch: choose a site with QA in the list of sites on the menu bar (A.2), give the User the permissions they need (3.3) and sign out and back in, or ask Continuum support about the site's QA (A.1).
Lot Disposition isn't in the QA menus	Lot disposition isn't turned on for the site, the User doesn't have the permission, or they haven't signed in since	Turn it on in Change Site Settings (3.2), give the User the Lot Disposition permission (3.3), then sign out and back in.
A lot disposition wasn't emailed	Auto Notifications is off for the site, no contact is assigned to the commodity, or the site's email account isn't set up	The message after Save says which. Check Change Site Settings and Verify / Modify Email Configuration (3.2), and Assign Notifications to Contacts (3.3).

Symptom	Likely Cause	Fix
Corrective Actions isn't in the QA menus	The User doesn't have the Corrective Actions permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
Someone can't be chosen as the owner	Only the site's Quality Control Managers and its Users with the Corrective Actions permission can be owners	Give the User the Corrective Actions permission (3.3).
The owner of a corrective action wasn't emailed	The owner has no email address, the site's email account isn't set up, or you assigned yourself	The message after saving says which. Add the email address on Add / Change Users, or check Verify / Modify Email Configuration (3.2).
Customer Claims isn't in the QA menus	The User doesn't have the Customer Claims permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A PDF or photo can't be added to a claim	It is larger than the server accepts (the limit is shown under the files box), it isn't a photo or a PDF, or the claim already has 5 files or is closed	Make the PDF smaller or ask your administrator to raise the server's upload limit; remove a file first; or reopen the claim.
An amount is refused	It was typed with a decimal comma (1250,50)	Use a decimal point: 1250.50 or 1,250.50.

Symptom	Likely Cause	Fix
Grower Scorecards isn't in the QA menus	The User doesn't have the Grower Scorecards permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
Grower Scorecards has no Quality or Condition column	No inspection question uses the Quality score or Condition score unit of measure, or none was answered in the dates chosen	Check the questions' unit of measure (5.2), or widen the dates.
A grower's held, rejected or dumped share looks wrong	Some of the grower's inspections have no disposition yet, so they aren't counted	Record the dispositions on Lot Disposition (6.7); the scorecard shows how many inspections the shares are based on.
Calibration Records isn't in the QA menus	The User doesn't have the Calibration Records permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
Passed and Failed can't be chosen when recording a calibration	The instrument has a tolerance and readings were entered, so the result is worked out from them	To record a fail although the readings are within tolerance, tick Record it as failed even if the readings are within tolerance (6.12).
An instrument shows Out of service	Its newest calibration failed	Repair or adjust it and record a calibration that passes. If the failed one was entered by mistake, a Quality Control Manager can void it (6.12).

Symptom	Likely Cause	Fix
Trend Alerts isn't in the QA menus	The User doesn't have the Trend Alerts permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
No trend alert emails arrive	The daily job isn't running, the daily email is off in Limits, or the site's email settings are incomplete	Check the daily job line on Trend Alerts (6.13), Limits, and the site's email settings (3.2).
A User doesn't see some alerts that a QC Manager sees	Alerts about held lots, claims, corrective actions and calibrations need the permission for those pages	Give the User the matching permission (3.3), if they should see them.
QA Dashboard isn't in the QA menus	The User doesn't have the QA Dashboard permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A tile or chart is missing from the QA Dashboard	The User can't open the page behind it, or that feature isn't set up for the company	Give the User the matching permission (3.3), if they should see it.
Grower Certificates isn't in the QA menus	The User doesn't have the Grower Certificates permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.

Symptom	Likely Cause	Fix
No grower is shown as missing a certificate	No certificate types are required at the site yet, or the grower hasn't been inspected within the active period	Choose the required certificates in Settings on Grower Certificates (6.15), or choose All growers.
A lot has a certificate warning although the grower has the certificate	The certificate wasn't valid on the inspection date, or it was entered with another type	Check the type and the Valid from and Expires dates on the grower's page (6.15) and correct them with Change.
Inspection Sign-off isn't in the QA menus	The User doesn't have the Inspection Sign-off permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
An inspection has no tick box on Inspection Sign-off	It is your own inspection, or it is already signed off	Someone else signs off your inspections. Signed-off ones are under Signed off (6.16).
A signed-off inspection shows Changed since sign-off	It was edited on Edit Quality Inspections after it was signed off	Open it, select See what changed, and sign it off again (6.16).
Audit Pack isn't in the QA menus	The User doesn't have the Audit Pack permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A section isn't offered on Audit Pack	The User can't open the page behind it, or that feature isn't set up for the company	Give the User the matching permission (3.3), if it should be in their packs.

Symptom	Likely Cause	Fix
A table in the audit pack ends with "... and N more, not shown here"	A table shows at most 2,000 rows	Make packs for shorter periods, for example a quarter at a time (6.17).
Some characters show as "?" in the audit pack	The PDF shows Western European letters only (not, for example, Chinese characters)	Nothing to fix: Continuum QC keeps the text as it was entered.
Inspector Training isn't in the QA menus	The User doesn't have the Inspector Training permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
Someone isn't listed under Who attended	They aren't a User assigned to the site and haven't inspected there in the active period	Assign them to the site (3.3), then record the session.
An inspection is flagged although the inspector was trained	The session doesn't qualify for that commodity, Qualified was cleared for them, or the qualification had run out (or hadn't started) on the inspection date	Open the session from the inspector's page and check its date, Qualifies for and Qualified; correct it with Change if it was entered wrongly (6.18).
Grower Action Requests isn't in the QA menus	The User doesn't have the Grower Action Requests permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.

Symptom	Likely Cause	Fix
A grower user doesn't see a request	Their account isn't linked to that grower, or they haven't signed in since Action Requests was installed	Link the account on gear > Growers > Assign Grower User to Grower (3.3), then ask them to sign out and back in.
A request wasn't emailed to the grower	None of the grower's users has an email address, the site's email account isn't set up, or Email the request to the grower's users was cleared	Add the email address on Add / Change Grower Users (3.3) and check the site's email settings (3.2), or record the grower's answer yourself (6.19).
Management Review isn't in the QA menus	The User doesn't have the Management Review permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A review can't be closed	Only Quality Control Managers close reviews, and only once the meeting date has come, with who attended and the conclusions entered	Enter what the message asks for, or ask a Quality Control Manager to close the review after the meeting (6.20).
Someone can't be chosen as an action's owner	Owners are the site's Quality Control Managers and its Users with the Management Review permission	Assign the User to the site and give them the permission (3.3).
Approved Growers isn't in the QA menus	The User doesn't have the Approved Growers permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.

Symptom	Likely Cause	Fix
Save decision isn't on a grower's page	Only Quality Control Managers record approval decisions	Ask a Quality Control Manager of the site to record it (6.21).
A lot shows a grower approval warning	The grower was suspended or not approved on the inspection date, or has been since	Select See approval to open the grower's approval, and decide what to do with the lot on Lot Disposition (6.7). The warning stays on lots received while the grower was not approved.
Controlled Documents isn't in the QA menus	The User doesn't have the Controlled Documents permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
I have read it can't be selected	The document's file hasn't been opened yet	Open the file under the version (Word and Excel files download), then select I have read it (6.22).
Someone isn't asked to read a document	They aren't an active User of the site with the Controlled Documents permission, or the document is for chosen people only	Check their user and permissions (3.3), or change who must read it on the document's page (6.22).
Publish a new version has no form	A version is still to take effect	Wait until it is in effect, or withdraw it first if it needs changing (6.22).

Symptom	Likely Cause	Fix
Shelf Life isn't in the QA menus	The User doesn't have the Shelf Life permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A sample has no Record a check form	It is too early for its next check (a check can be a day early, but never on the target day), or the sample has failed, reached its target or ended	The sample's page says when its next check can be recorded (6.23).
A check counts for a later day than expected	It was recorded late, nearer the next planned day	A check counts for the nearest planned day. If its date was wrong, a Quality Control Manager voids it and it is recorded again (6.23).
Customer Specifications isn't in the QA menus	The User doesn't have the Customer Specifications permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A lot shows Can’t tell for a customer	The inspection lacks an answer one of the spec’s limits needs, such as no size recorded or no Brix answer	The lot’s page shows that limit with ?. Fill in the answer on Edit Quality Inspections (6.6) if it was measured; otherwise give the reason when you record the lot as going to the customer (6.24).

Symptom	Likely Cause	Fix
A new version is refused	Its In force from day isn't after the newest version's or is more than 90 days ahead, or the spec is retired	Choose a later day, withdraw the newest version if it was added by mistake, or select Use the spec again first (6.24).
Quality Certificates isn't in the QA menus	The User doesn't have the Quality Certificates permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A lot isn't listed to issue a certificate	The lot isn't recorded as going to the customer, it goes more than 30 days ahead or went before the last 14 days, or it already has a certificate for that customer	Record where the lot goes on Customer Specifications (6.24). For an older lot, select Issue a quality certificate under Going to on the lot's page; find one already issued with Find certificates (6.25).
A certificate wasn't emailed	The site's email account isn't set up, the mail server didn't take it, or an address is wrong	The certificate's page says which under Emails. Check Verify / Modify Email Configuration (3.2) and the addresses, then select Email it again (6.25).
A certificate is wrong	It was issued before the inspection was corrected, or with the wrong photos, remarks, reason or language	A Quality Control Manager issues a replacement from the certificate's page; the old one is voided (6.25). Tell the customer if the old one was sent.

Symptom	Likely Cause	Fix
Inspector Calibration isn't in the QA menus	The User doesn't have the Inspector Calibration permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. Inspectors who only take part don’t need it: they use the link to the check.
An inspector can’t open the link to a check	They can’t sign in on the web (they have no page permission at all), or they aren’t taking part in that check	The lead types in their paper sheet, or adds them with Change while the check is open (6.26).
An inspector can’t enter results in a reopened check	They hadn’t entered before it closed, or their entry was cleared after it: they may have seen the answers	The lead or a Quality Control Manager types in their paper sheet (6.26).
An inspector stays out of line	Their latest result as an inspector for the commodity was outside a tolerance; leading a check doesn’t clear it	Start a check of that commodity with them taking part; passing it clears it (6.26).
Quality Objectives isn't in the QA menus	The User doesn't have the Quality Objectives permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A measure isn’t offered when adding an objective	The feature it comes from isn’t in use at your company, such as Customer Claims for claims per 100 inspections	Choose another measure, or your own measure entered each month (6.27).

Symptom	Likely Cause	Fix
An objective shows No figures yet	No month of it has ended with records: no inspections, for example, or for your own measure no figure entered. Sign-off and the training check must be on for the measures that use them	Wait for the first month to end, or enter its figure (6.27).
What is measured or the period can’t be changed	A month of the objective has ended, or figures or explanations are in	Void it and add a new one (6.27). The target can still change, with the reason.
Mock Recalls isn't in the QA menus	The User doesn't have the Mock Recalls permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A mock recall lists no customers	The lot wasn’t recorded as going to any customer on Customer Specifications, or Customer Specifications isn’t in use	Add each customer it went to on the exercise (6.28), and record where lots go on Customer Specifications (6.24).
The clock of a mock recall doesn’t stop	A customer isn’t confirmed, a quantity is missing (what is still at the site too: enter 0), or the quantities account for less, or more, than the target share of the lot	See Still missing at the top of the exercise (6.28).

Symptom	Likely Cause	Fix
A mock recall can’t be started on a lot	No inspection at the site has that lot number or serial; or the lot has an exercise in progress, which opens instead	Check the lot number on Edit Quality Inspections (6.6), or finish or cancel the exercise in progress (6.28).
Internal Audits isn't in the QA menus	The User doesn't have the Internal Audits permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
An audit can't be completed	A question isn't answered yet, or a finding has no owner or due date	Select Next unanswered question, and choose each finding's owner and due date (6.29).
A changed question doesn't show on an audit	The audit was started before the change: it keeps the questions of its version	The next audit uses the new version (6.29).
Someone can't be chosen as lead auditor or owner	They don't have the Internal Audits permission at the site	Give them the permission (3.3).
External Audits isn't in the QA menus	The User doesn't have the External Audits permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
An external audit can't be recorded	The audit date is after today: an audit is recorded once it has happened	Book the date on its program instead, with Change the program, or book the next audit (6.30).

Symptom	Likely Cause	Fix
The owner of a non-conformance wasn't emailed	The owners are emailed together, once the audit's non-conformances are in	Select Email the owners on the audit's page (6.30).
A non-conformance can't be changed or removed	It was sent to the auditor	If the auditor doesn't accept it, return it to be answered again (6.30).
A certificate still shows as expired after the audit	The new certificate hasn't been added	On the program's page, select Add a new certificate (after an audit) (6.30).
Change Control isn't in the QA menus	The User doesn't have the Change Control permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A change can't be sent for approval	Its risk hasn't been assessed	Select Change the request, or assess the risk, choose the Risk level, and save (6.31).
A Quality Control Manager can't decide on a change	They asked for it: another Quality Control Manager of the site decides	Ask another Quality Control Manager of the site (6.31).
A change can't be put into effect	Some of its actions are still open	Mark them done, or remove those no longer needed (6.31).
QA Setup isn't in the QA menus	It is for administrators and Quality Control Managers, and only once the quality assurance features are installed for your company	Sign in again as a Quality Control Manager (new pages come with signing in); otherwise ask Continuum support (6.32).

Symptom	Likely Cause	Fix
QA Setup shows a feature as Not installed	It isn't installed on the server yet for your company	Ask Continuum support to install it (6.32).
QA Setup shows the daily Trend Alerts job as To do	It hasn't run on the server in the last 36 hours, so new alerts aren't emailed	Ask Continuum support to check the server's schedule (6.32). The alerts still show on Trend Alerts (6.13).
There is no Copy from another site on QA Setup	You can copy only between sites you are a Quality Control Manager of (or as an administrator), so it needs two such sites	Ask an administrator to copy, or to add you to the other site (6.32).
An objective isn't copied: No one at this site can own it	No User of the site has the Quality Objectives page, and there is no Quality Control Manager of the site	Give someone the Quality Objectives page (3.3), have them sign in again, then copy again (6.32).
Sampling Plans isn't in the QA menus	The User doesn't have the Sampling Plans permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
The question that holds the lot size has no choices	The commodity has no number question for the lot size in the inspection’s header or footer	Add one, such as Cases in lot, on Header / Footer Questions, or use The same units for every lot (6.33).
Inspections show No lot size	The lot size question wasn't answered, or not with a whole number	Answer it on the inspection; the result follows at once (6.33).

Symptom	Likely Cause	Fix
Cold Chain isn't in the QA menus	The User doesn't have the Cold Chain permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
Every lot shows No temperature	The temperature question has no unit of measure in °F or °C	Give the question a °F or °C unit of measure on Add / Change Inspection Questions (6.34).
No storage readings come in	No temperature question is set as a place's reading, or the place is no longer logged	Set them on Cold Chain > Temperature questions, and check the place on Places (6.34).
The Trailer Temp answers aren't read	Trailer Temp isn't set yet	Add a place of the kind Trailer or container, then set Trailer Temp to it on Temperature questions (6.34).
A change of the temperature questions says the readings are being read from the app just now	Someone was looking at the site's readings as you saved	Select Save again in a moment (6.34).
A question can't be set as a place's reading	It is a question of the inspection's body, answered for each sample	Ask for the place's temperature in the header or footer (6.34).
Non-Conforming Product isn't in the QA menus	The User doesn't have the Non-Conforming Product permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.

Symptom	Likely Cause	Fix
There is no Decide form on a record	Only Quality Control Managers decide, close and void records	Ask a Quality Control Manager of the site (6.35).
Risk Register isn't in the QA menus	The User doesn't have the Risk Register permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A risk can't be added: The score with the controls can't be higher than without them	The likelihood or severity with the controls is set higher than before them	Score it as if nothing were done about it first, then with the controls; with them it is the same or lower.
What happened on it lately shows nothing	The risk isn't tied to a commodity, a grower or a clause, or nothing happened on it over the days looked back	Change the risk to tie it, or lengthen the days in the Settings (6.36).
Control Charts isn't in the QA menus	The User doesn't have the Control Charts permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
The control limits weren’t set: a baseline needs at least 20 points that vary	Fewer than 20 inspections in the baseline answered the measure, or they all gave the same value	Choose a longer baseline period, or wait for more inspections (6.37).
A chart shows no signals at all	The chart has no control limits yet	A Quality Control Manager sets them from a baseline period (6.37).

Symptom	Likely Cause	Fix
A question isn't charted	It isn't answered with a number, it is inactive or not asked for the commodity, or it is the app's record of the lot (such as Quantity Inspected or Trailer Number)	Check the question in the commodity's questions; only number answers are charted.
Lab Results isn't in the QA menus	The User doesn't have the Lab Results permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A lab test shows No limits to check	Its commodity has no limits for the analytes reported, and the markets have no default limit (or the analytes aren't pesticide residues)	Add the limits on the Limits (MRLs) tab, then Check again against today's limits (6.38).
A lab test shows No limit: check it	A pesticide residue was found for which a market has neither an MRL for the commodity nor a default limit	Add the limit (or the market's default limit) on the Limits (MRLs) tab and Check again against today's limits, or Say what was done (6.38).
A result isn't accepted	It isn't a number, ND, <LOQ or <0.01, or, for a pathogen, Detected or Not detected; an analyte is given twice; or a number such as 1,200 could be read two ways	Type it as the lab reports it, one line per analyte, and a large number without the comma (1200) (6.38).

Symptom	Likely Cause	Fix
Recalls isn't in the QA menus	The User doesn't have the Recalls permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
A recall has no customers	Its lots weren't recorded as going to customers on Customer Specifications	Add the customers by hand under Add a customer (6.39).
The notice wasn't emailed	The site has no email account set up, or the customer has no email address	Set up the site's email account (Site Setup), or tell the customer by phone and record it under Work on it (6.39).
A customer says the link doesn't work	A newer notice was sent to them, they were taken out, or the recall is closed or cancelled	Send the notice to them again while the recall is open, or type in their answer (6.39).
Environmental Monitoring isn't in the QA menus	The User doesn't have the Environmental Monitoring permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
Nothing is picked to swab	The site has no swab points or no schedule yet, swabbing is paused in the Settings, or this period's swabs were all taken	A Quality Control Manager adds the points and the schedule, or turns the pause off (6.40).
A point is never picked	It is no longer used, doesn't get the test, or is under an open positive for the test	Use it again or tick the test on the point; once the positive is closed it is picked again (6.40).

Symptom	Likely Cause	Fix
A floor plan isn't accepted	It is a PDF, or larger than allowed	Save it as a PNG or JPEG picture, smaller, and add it again (6.40).
Sanitation isn't in the QA menus	The User doesn't have the Sanitation permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
No pre-op check is due for an area	Today isn't a production day, the area has no checklist or is no longer used, or sanitation is paused in the Settings	Add a pre-op check today on Pre-op, add the checklist, or a Quality Control Manager changes the Settings (6.41).
A User can't check an area or verify cleaning	Only Quality Control Managers and the Users chosen in the Settings do the pre-op checks and verify	A Quality Control Manager ticks the User in the Settings (6.41).
Some cleaning can't be ticked to verify	You recorded it: someone else verifies it	Another checker or a Quality Control Manager verifies it (6.41).
Label Checks isn't in the QA menus	The User doesn't have the Label Checks permission, or hasn't signed in since it was given	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in.
No start-up label check is due for a line	Today isn't a production day, the line is no longer used, it was marked not running, or label checks are paused in the Settings	Record a check anyway with Record a check, use the line again, or a Quality Control Manager changes the Settings (6.42).

Symptom	Likely Cause	Fix
A User can't record a label check	Only Quality Control Managers and the Users chosen in the Settings check the labels	A Quality Control Manager ticks the User in the Settings (6.42).
An approved label isn't offered for a check	It is no longer used, or it has nothing to check yet	A Quality Control Manager uses it again or adds its items (6.42).
Wash Water isn't in the QA menus	The User doesn't have the Wash Water permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.
No start-up check is due for a wash point	Today isn't a production day, the wash point is no longer used, it was marked not running, or wash water checks are paused in the Settings	Record a check anyway with Record a check, use the wash point again, or a Quality Control Manager changes the Settings (6.43).
A User can't record a wash water check	Only Quality Control Managers and the Users chosen in the Settings check the wash water	A Quality Control Manager ticks the User in the Settings (6.43).
A reading out of range can't be read again	It is more than 14 days back	A Quality Control Manager closes it without reading again, saying why (6.43).
Load Inspections isn't in the QA menus	The User doesn't have the Load Inspections permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in; or ask Continuum support about the site's QA (A.1).

Symptom	Likely Cause	Fix
Inspect a load isn't there	The User isn't chosen in the Settings to inspect loads, or the site has no trailer checklist yet	A Quality Control Manager ticks the User in the Settings, or sets up the Trailer checklist (6.44).
A load can't be released	An item isn't answered, the customer or the lots aren't typed, the trailer failed a critical item, or the load has a problem and only a Quality Control Manager releases it	Answer every item and type the customer and the lots; reject a trailer that failed a critical item; a Quality Control Manager releases a load with another problem, saying why (6.44).
A pulp temperature is judged against the site's limits, or not at all	No lot was typed with it, the lot has no inspection at the site, or its commodity has no limits on Cold Chain on the day of the load	Type the lot as on its inspection, or set the commodity's limits on Cold Chain (6.34); the site's limits are in the Settings (6.44).
Approved Suppliers isn't in the QA menus	The User doesn't have the Approved Suppliers permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site, see The QA menus aren't there.
A supplier can't be approved	A document its category needs is missing or expired (the page lists which)	Add the document, or approve the supplier with conditions, saying which (6.45).
Add a supplier isn't there	The site has no category in use yet	A Quality Control Manager adds the categories, or starts from the usual ones (6.45).

Symptom	Likely Cause	Fix
A wash point or a load doesn't show its supplier	No supplier is chosen for the wash point, or no supplier on Approved Suppliers has the carrier's name	Choose the wash point's supplier (6.43), or add the carrier on Approved Suppliers under the same name (6.45).
Metal Detection isn't in the QA menus	The User doesn't have the Metal Detection permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.
No start-up check is due for a detector	Today isn't a production day, the detector is no longer used, it was marked not running, or metal detector checks are paused in the Settings	Record a check anyway with Record a check, use the detector again, or a Quality Control Manager changes the Settings (6.46).
A detector is checked less often than the others	It has its own rule: checked every few hours, or only at start-up and the end of the run	A Quality Control Manager changes the detector under Detectors, emptying Its own rule to follow the site's setting (6.46).
A User can't record a metal detector check	Only Quality Control Managers and the Users chosen in the Settings check the detectors	A Quality Control Manager ticks the User in the Settings (6.46).
Net Weight Checks isn't in the QA menus	The User doesn't have the Net Weight Checks permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.

Symptom	Likely Cause	Fix
A pack isn't on Today or in the check form	The pack is no longer used	A Quality Control Manager selects Use it again on the pack under Packs (6.47).
A check can't be saved: too few packages	The pack's sample (or the Settings') is more packages than were weighed	Weigh and type the rest of the sample, or a Quality Control Manager changes the pack's Packages a check weighs (6.47).
A check fails though its average is over the declared weight	A package is below the lowest net weight allowed: the declared weight less the legal tolerance (NIST Handbook 133 in the United States, SFCR Schedule 4 in Canada), or the lowest weight set for the pack	Deal with the light package and check the scale; the lowest allowed shows on the pack under Packs (6.47).
Glass and Brittle Plastics isn't in the QA menus	The User doesn't have the Glass and Brittle Plastics permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.
An area isn't on To do, or has no Check button	The area is no longer checked, or it has no item in the register (no item to check)	A Quality Control Manager selects Check this area again on the area (under Register), or adds its items (6.48).
A breakage can't be cleared	Whether product was exposed isn't known yet, or it was and what was done with it isn't decided	Select change what is known on the breakage and say so; then a Quality Control Manager clears the area (6.48).

Symptom	Likely Cause	Fix
An item stays Damaged after it was fixed	Its repair wasn't recorded	Select repaired or replaced on the item, in its area, and say how (6.48).
Water Testing isn't in the QA menus	The User doesn't have the Water Testing permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.
A test has no Record a sample link	The test is no longer done, or its source is set aside	A Quality Control Manager selects Do it again on the test, or Use it again on the source (6.49).
A result can't be saved as Detected	The test's limit is a number (at most or at least): detected can't be judged against it	Enter the lab's count with A number (6.49).
A source stays not used after a passing retest	It was suspended until a QC Manager uses it again, or a failed result of another of its tests is still open	A Quality Control Manager selects Use it again on the source, or deals with the other failed result (6.49).
Maintenance isn't in the QA menus	The User doesn't have the Maintenance permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.

Symptom	Likely Cause	Fix
A User can't give the hygiene clearance	Only Quality Control Managers and the Users chosen in the Maintenance settings give it	A Quality Control Manager ticks the User under Who gives the hygiene clearance in the Settings (6.50).
The work done can't be recorded	The day and time are before the day the work order was requested, more than 14 days back, or later than now	Check the Day and the Time of the work (6.50).
A work order can't be cancelled	It has been worked on (it waits for its clearance or is closed), or it has a corrective action	Give the hygiene clearance or send the work back first; a work order with a corrective action stays (6.50).
Visitors and Contractors isn't in the QA menus	The User doesn't have the Visitors and Contractors permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.
Someone is listed as not signed out from an earlier day	The person left without being signed out	Find out when they left and sign them out on Today with that day and time (6.51).
A visit from the paper log can't be signed in	It is more than 14 days back, its time is later than now, or, for an earlier day, the Time out is missing	Check the Day, the Time in and the Time out (6.51).

Symptom	Likely Cause	Fix
Someone who answered a health question yes must enter the packing house	Anyone answering yes is Not allowed into production	If the risk is controlled (a wound covered and gloved), a Quality Control Manager opens the visit and selects Allow into production, saying why (6.51).
Employee Training isn't in the QA menus	The User doesn't have the Employee Training permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.
A new hire shows Not trained	Their days to take the course after the day hired have passed, or the day hired is missing (then they count as hired before the course became required)	Record the session they attended, or check the worker's day hired and the course's days to take it (6.52).
The training was given on paper	The session isn't recorded yet	Record the session with its day (up to 5 years back), tick who attended, and add a photo of the sign-in sheet (6.52).
A session was recorded under the wrong course	The course was chosen by mistake	Who recorded it, or a Quality Control Manager, changes its course with Change the session; or a Quality Control Manager voids it (6.52).

Symptom	Likely Cause	Fix
Field Audits isn't in the QA menus	The User doesn't have the Field Audits permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.
A User sees the fields but can't add or assess them	The User isn't chosen in the page's Settings	A Quality Control Manager ticks the User under Who keeps the fields and assesses them, besides the QC Managers, in Settings (6.53).
Approved for harvest is refused	An answer is a risk	Approve the field with conditions, saying which (the mitigation), or don't approve it (6.53).
An assessment was recorded on the wrong field	An assessment can't be changed	A Quality Control Manager voids it with Void the assessment, saying why, and it is recorded again on the right field (6.53).
Food Defense isn't in the QA menus	The User doesn't have the Food Defense permission, or hasn't signed in since it was given, or the site doesn't have QA	Give the User the permission on Add / Change User Permissions (3.3), then sign out and back in. For the site's QA, see A.1.
A User can't record a security check	Only Quality Control Managers and the Users chosen in the Food Defense settings do them	A Quality Control Manager ticks the User under Who does the security checks in the Settings (6.54).

Symptom	Likely Cause	Fix
A day is counted missed although the check was done on paper	The check wasn't recorded on its day	Record it under Missed, last 14 days, with its day and time (6.54).
An incident can't be voided	A corrective action was raised from it	Close the incident instead, saying how it ended (6.54).
The mock recall schedule can’t be turned off	The site is in Canada, where a recall simulation is required at least once every 12 months (SFCR, section 84)	Keep the schedule on, every 12 months or less (6.28); check the site’s country on QA Setup (6.32).
The CSV file for the regulator opens with odd characters	The spreadsheet program opened it with another character set	Open it with Excel’s Data, From Text/CSV, choosing UTF-8; the file starts with a byte order mark so most programs read it right away.
A site shows the wrong country on QA Setup	No country was set on QA Setup, and the site’s Country, state or province on Add / Change Sites says another (or is empty: the United States)	A Quality Control Manager of the site chooses the country on QA Setup and selects Save (6.32).
Temperatures show in °C (or °F) at a new site	Cold Chain’s settings haven’t been saved: the site uses its country’s unit	Choose °F or °C in Cold Chain’s Settings and select Save (6.34).
A Canadian site’s temperatures are in °F	The site was running before the country came in: it keeps the unit it had (QA Setup’s Country line says so)	If the site uses °C, choose °C in Cold Chain’s Settings and select Save (6.34).

Symptom	Likely Cause	Fix
QA Setup shows Time zone To do	The site has no time zone on Add / Change Sites: its days are counted in America/Phoenix	An administrator sets the site's time zone on Add / Change Sites (3.2).
A file removed from a record is needed again (an auditor asks for it)	Files removed leave their records; they are kept for the records	A Quality Control Manager of the site opens QA Setup, Files removed, See them, and downloads it (see 6.32).
Check the file says Choose a CSV file, or This is not a CSV file	An Excel workbook (.xlsx) was chosen, or one only renamed .csv	In Excel, save it with File > Save As > CSV UTF-8, and choose that file (6.55).
The file has no "Site name" column (or another required column)	The file's first row isn't the column headers, or a header was changed	Start from the template (Download the template) and keep its first row (6.55).
A sites file can't be imported: Your licence allows ... sites	The new sites would take the company past the sites its licence allows (inactive sites count too)	Import fewer sites, or ask Continuum support about the licence (6.55).
A growers row says ... has no grower list (the Grower header question)	The site has no Grower question at the top of its inspections	Add the site's Grower header question (5.2), then check the file again (6.55).
A User added by an import can't sign in to the website	No permissions were copied to them (No permissions are copied on their row)	Give them pages on Add / Change User Permissions (3.3) or a permission set (6.57).

Symptom	Likely Cause	Fix
The new users' temporary passwords are no longer shown	They are shown only right after the import, and never kept	Give the person a new password on Add / Change Users (with User must change password at next log-in) or Add / Change QC Managers (3.3).
Saving a site group says Someone else changed this group first	Another administrator saved it after you opened it	Look at the group again and make your change again (6.56).
Company Overview says You have no active site with QA on	Your sites are QC sites, or inactive	Ask Continuum support about QA at your sites (A.1).
A User doesn't see the pages of the set given to them	They haven't signed in since; or they were left as they were, because their site has QA off and every page of the set is a QA page; or the set was changed after it was given	Have them sign out and back in; give them a set with pages for a site with QA off, or ask Continuum support about the site's QA (A.1); give the set again after changing it (6.57).
Permission Sets says "Another set has that name."	Another set has that name, in English or in Spanish	Choose another name, or change the other set (6.57).
The user import refuses a row: "No permission set named … (Permission Sets)."	The name in the Permission set column isn't that of a set offered, in English or Spanish	Type the set's name as Permission Sets shows it, or offer the set again, then check the file again (6.57).

Symptom	Likely Cause	Fix
People still land on the home page after signing in	The option is off (the default), the person has no site with QA on, or their password expires within 10 days	A system administrator chooses Their start page, Today on Site Setup (6.58); it applies from the next sign-in (6.60).
A site can't be ticked on Site Setup	The site has QA off	Only sites with QA on can be ticked: ask Continuum support about the site's QA (A.1).
Site Setup's copy says "… changed meanwhile: preview them again."	The setup of those sites changed between the preview and the copy	Select Preview the copy again, then Copy to these sites (6.58).
Traceability Events isn't in the QA menus	The User doesn't have the Traceability permission, or hasn't signed in since it was given	Give the User the Traceability permission on Add / Change User Permissions (3.3), or a permission set with it (6.57), then sign out and back in.
Recording an event is refused (Enter the traceability lot code., Say who it was shipped to....)	A few things are required: the date (not after tomorrow), the lot code (not for harvesting and cooling), the quantity and its unit, the farm, who it was shipped to or received from, and a transformation's lots used	Fill in what the message says; anything else can be left empty: it is listed as missing (6.61).
An event shows missing items such as Shipped to (the next recipient): phone	A location the event names lacks its phone, address, or city, state and zip code	A Quality Control Manager completes the location on Locations: every event that names it is completed (6.61).

Symptom	Likely Cause	Fix
The FDA spreadsheet is empty	Only commodities on the Food Traceability List is ticked and no commodity is on the list (or none of the events is), or the dates have no events	A Quality Control Manager marks the commodities on Settings, or untick the box; check the dates (6.61).
A row of an imported file is Skip: Already recorded	The site already has an event of the same kind, date, lot code, quantity and document number, or an earlier row of the file is the same	Nothing to do if it is the same event; if it is another one, give it its own document number and check the file again (6.61).
A grower doesn't see Harvest Records, or the page says no site takes harvest records	No site of theirs has Growers record their own harvests ticked, the grower user isn't assigned to a grower on the site's grower list, or they haven't signed in since	A Quality Control Manager ticks it on Traceability Events > Settings; assign the grower on Assign Grower User to Grower (3.3); the grower signs out and back in (6.62).
A grower can't correct or withdraw a harvest record (The site has already packed this harvest into a lot: ask them to correct it.)	The site used the record for a lot's initial packing	A Quality Control Manager of the site corrects the harvest record on Traceability Events (6.62).
An initial packing is refused: … is the harvest of …, but this lot's farm is …	A harvest record ticked is of another farm (or commodity) than the lot's	Untick it, or change the lot's farm or commodity (6.62).

Symptom	Likely Cause	Fix
Voiding a harvest record is refused (An initial packing used this harvest record: it can't be voided....)	An initial packing that isn't voided used the record	Void or correct that initial packing first, or correct the harvest record instead (6.61, 6.62).
Agency Connections: a file Could not be sent: The SFTP server's key doesn't match the one saved	The system changed its server's key, or the files aren't reaching its real server	Ask the system whether its key changed; only then paste the new key on Settings and select Try again on the file (see 6.63).
Agency Connections: The SFTP server refused the user name or the password / key	The login saved isn't the system's any more (changed or expired there)	A system administrator types the current password or key on Settings and selects Save and test the connection (a site's own login: on Sites' own logins, then Test), then Try again on the file (see 6.63).
Agency Connections: The sending was interrupted: the file may have arrived	The sending stopped half way; it isn't sent again by itself, so as not to send it twice	Look for the file in the other system: if it is there, select It arrived in ...: mark it as sent (or Mark as uploaded by hand, or as arrived on Files); if not, Try again (see 6.63).
Agency Connections: Keys and passwords can't be saved yet	The company's encryption key isn't set up on the server	Ask Continuum support to set it up (see 6.63).
Buyer Compliance: Send to ... is grayed out	Something still stops the submission: Before it can go lists it	Answer the questions, check the answers given before, choose the audit information, or add the missing certificate in External Audits (see 6.64).

Symptom	Likely Cause	Fix
Buyer Compliance: Answer every question and check the answers given before first: what was submitted is kept as it was.	Mark submitted was selected with a question unanswered or an answer given before not checked	Answer the questions and tick the answers given before that are still right (or select All … answers given before are still right), then mark it submitted again (see 6.64).
Buyer Compliance: You see this submission because it covers one of your sites. It is answered and sent by an administrator, or a QC Manager of all its sites.	The buyer's system covers a site that isn't yours	Ask a system administrator to answer it, or to limit the system to your sites (A site group or Chosen sites) if the buyer buys only from them (see 6.64).
Buyer Compliance: That buyer's system is off: turn it on first.	The buyer's system, or the buyer, is turned off	A system administrator ticks On (its submission opens each year) on the system, or A buyer now on the buyer, and selects Save (see 6.64).
Buyer Compliance: Sending was interrupted, so it may have arrived	The server stopped while the submission was being sent	Look for it in the system's portal: if it arrived, mark it submitted under Submitted by hand in the system's portal, then mark what the buyer said; if not, select Send to … again (see 6.64).
Buyer Compliance: External Audits isn't installed for this company: a site's certificates can't be kept yet.	External Audits (or, for a grower, Grower Certificates) isn't installed	Ask Continuum support to install it; the facility can then be added (see 6.30, 6.64).

Symptom	Likely Cause	Fix
Market Prices: No prices yet. In Agency Connections, add USDA Market News with your free API key and choose its reports	The company has no USDA Market News connection, or none of its reports has been read yet	A system administrator adds the Market News connection with its API key and its reports, and selects Read now (see 6.63).
Market Prices: Agency connections are not installed for this company yet.	Agency Connections isn't set up for the company	Ask Continuum support to install it.
Market Prices: This period has more prices than one page can show: it starts on …	The period has more prices than the page reads at once; its earliest days are left out	Choose a shorter period to see the earlier days (see 6.65).
Market Prices: Your weeks beside the market doesn't appear, or has no claims	The company's commodity has a name Market News doesn't use, or there were no shipments or claims of it at your sites in the period; a claim without an inspection isn't counted	A system administrator types the Market News name under Your commodities in Market News on the connection's Settings (see 6.63); link the claims to their inspections in Customer Claims (see 6.10).
There is no site list on the menu bar	The person has one site, or none of their sites has QA	Nothing to fix: the list is for someone with two sites or more, one with QA at least (6.68). Give a QC Manager more sites, or a site group, on Add / Change QC Managers (6.56).
A QC Manager doesn't have a site just added to their site group	Group sites are given at sign-in	The manager signs out and back in (6.56).

Symptom	Likely Cause	Fix
Today, the QA Dashboard or Company Overview: As of shows an old time	The figures are counted every 15 minutes on the server; the counting hasn't run since	Select Refresh to count the sites now. If As of stays hours old, ask Continuum support (6.60, 6.14).
Search: "..." is too short: type at least 2 characters.	One character was typed	Type at least 2 characters; for a record, its number with its letters, such as CA-12 (6.67).
A list says Choose a site to add one or change its settings.	The Site list shows several sites	Choose one site in the Site list (6.68).
Cross-site Reports: The report could not be loaded. Try again, or choose fewer sites or a shorter period.	Reading the figures failed or took too long	Choose fewer sites or a shorter period, and select Show again (6.66).
Daily digest: Your account has no valid email address, so the digest cannot be sent	The account has no email address, or not a valid one	Add the address on User Settings > Change User Information, or ask a system administrator (6.69).
The daily digest doesn't arrive	Nothing was waiting (with Yes, when something is waiting), the hour is the server's, or none of the person's sites has an email account	Check What it would say now and the server time beside At on Daily digest, and the sites' email accounts (3.2 of the user manual); ask Continuum support whether the hourly sending runs (6.69).
Shipments: Nothing was saved: 3 lots outside the customer's spec have no reason. Give each one a reason, or one reason for all of them.	A shipment entered on the page is recorded only when every lot outside the customer's spec has a reason	Type a reason in each marked box, or one under One reason for all the lots outside the spec, and select Record shipment again (see 6.70).

Symptom	Likely Cause	Fix
Shipments: a lot is listed as Not found (No inspection of this lot at the site.)	The lot number, as typed or scanned, matches no inspection of the site, nor an inspection's serial number	Check the lot number for a typing or scanning mistake (Change the shipment); a lot really shipped without an inspection is listed on Exceptions (see 6.70).
Load Inspections: "Sonora Fresh Imports" is not one of the site's customers on Customer Specifications: add it there, then record the lots.	The load's customer, as typed, isn't one of the site's customers on Customer Specifications, so its lots weren't recorded as a shipment	A Quality Control Manager adds the customer on Customer Specifications, then selects Record now on the load (see 6.44, 6.70).
Import Shipments: Customer "0004412" is not one of the site's customers: choose which customer it is (Customers not found), or leave it out.	The file's customer number and name match no customer of the site (the number isn't the customer's Code on Customer Specifications)	Under Customers not found, choose the customer with Remember the number ticked, or Add as a new customer, and check again; or import the customer list (see 6.70).
Import Shipments: Already imported: shipment S-000007 (same customer, date and bill of lading or order). Left out.	A shipment of an earlier file has the same customer, ship date and bill of lading (else order number)	Nothing to do if it is the same shipment; if it is another, give it its own bill of lading in the file and check it again (see 6.70).
From the FS App: Only a QC Manager or a pre-op verifier of the site may record this (Sanitation, Settings)	The inspector isn't ticked under Who does the pre-op checks and verifies cleaning, besides the QC Managers in Sanitation's Settings	Give the inspector the Sanitation permission (3.3 of the user manual), tick them in Sanitation's Settings, then select Try again (see 6.71).

Symptom	Likely Cause	Fix
From the FS App: Only a QC Manager or someone chosen to do these checks may record this (the module's Settings)	A metal detector or wash water run by an inspector not on the module's list of who checks	Give the inspector the module's permission, tick them under Who checks the detectors (or the wash water), besides the QC Managers in its Settings, then select Try again (see 6.71).
From the FS App: Only a QC Manager or a clearer of the site may do this	A hygiene clearance by an inspector not on Maintenance's list	Tick the inspector under Who gives the hygiene clearance, besides the QC Managers in Maintenance's Settings, then select Try again (see 6.71).
From the FS App: Not made into a record yet: the job on the server that makes them may not be running (ask Continuum support)	A run the app didn't finish wasn't made into its record by the job on the server	Select Try again; if runs keep waiting, ask Continuum support to check the job.
The Food Safety app doesn't show a detector, an area or a work order added on the website	The tablet hasn't downloaded its forms since	Sync the tablet. Packing house > Locations, Areas and Equipment > In the app shows what it will download (see 6.72).
Locations, Areas and Equipment: Not saved: Type the name in Spanish.	Both names are required	Type the Name in Spanish; when adding several at once, after a bar: Cold room 1 | Cámara fría 1 (see 6.72).
Maintenance: Choose the equipment from the list.	The site has an Equipment list, and the equipment given isn't on it	Choose it in the drop-down, or first add it on Locations, Areas and Equipment (see 6.72).

Symptom	Likely Cause	Fix
Try it says TraceGains could not be used: TraceGains refused the token..., or the TraceGains documents stay To send	The Gather API token is wrong, or TraceGains no longer takes it: it may have run out (a token lasts up to a year).	Check it with TraceGains API Support (APISupport@tracegains.com): if it ran out, they extend it and you enter the new date under The connection; otherwise save the new token on the TraceGains tab of Buyer Compliance. Nothing is sent until then (see 6.64).
A TraceGains document says Sending was cut off after the file went, so it may have arrived...	The upload stopped after the file went; it isn't sent again by itself.	Look for it in TraceGains: if it is there, select Don't send and say so; if not, select Send now (see 6.64).
Choosing Live for USDA Organic INTEGRITY says Save its API key first (below), then choose Live.	No api.data.gov key is saved.	Get a free key at api.data.gov/signup, paste it under USDA Organic INTEGRITY's API on Buyer Compliance's Systems and save, then choose Live (see 6.64).
A facility's reading says The system doesn't know that number.	Its number in the system (the Operation ID for INTEGRITY) is wrong.	A system administrator corrects Its number in the system under the facility's Settings, then selects Read from USDA Organic INTEGRITY now (see 6.64).
Saving the Market News API key says The API key can't have a colon (:)...	The label (API Key:) was copied with the key.	Copy only the key from My Profile on My Market News and paste it again (see 6.63).

Symptom	Likely Cause	Fix
The TraceGains tab, a Trend Alert or the Administration card says The Gather API token runs out on … (or ran out on …)	A token lasts up to a year; the reminder starts 30 days before it runs out.	Ask TraceGains API Support (APISupport@tracegains.com) to extend it, then enter the new date under The connection (see 6.64). A date marked as assumed is a year after the token was saved: if TraceGains gave another, enter that one.
The CanadaGAP menu isn’t there	The CanadaGAP module is off for the company or the site, QA is off at the site, or the User has no CanadaGAP permission or hasn’t signed in since	Turn it on for the company and the site on Overview > CanadaGAP Module (see 6.74), give the User the permissions they need (3.3), then sign out and back in.
Traceability Events or Harvest Records: Harvest on … is before the earliest acceptable harvest date (…) of this production site.	An application on the production site has a PHI that ends after the harvest date	Check the harvest date and the applications on Agronomic Inputs; if both are right, type why it was harvested before that date and record again (see 6.61 and 6.77).
This site doesn’t record a harvest before that date (CanadaGAP Programme, Settings).	The site’s CanadaGAP settings refuse a harvest before the EAHD	Check the date and the applications. A Quality Control Manager can untick Refuse a harvest recorded before its production site’s EAHD in the settings (see 6.75).
Agronomic Inputs: Enter the PHI from the label (days), or add it to the product library.	The product isn’t in the library, or the library has no PHI for the field’s crop	Type the PHI from the label, or add the crop’s PHI to the product on Input Product Library (see 6.78).

Symptom	Likely Cause	Fix
A CanadaGAP form stays Due on the Programme	An annual form wasn't done or reviewed since the season started; for H1 and H2, an application waits for verification; for the water tests, a laboratory isn't known to be accredited	The reason is shown under the state. Do the assessment or select Reviewed, still valid (6.79), verify the applications (6.77), or add the laboratory with ISO/IEC 17025 on CanadaGAP Forms (6.76).
From the FS App: CanadaGAP is off for the site (CanadaGAP Module)	The run was sent after CanadaGAP was turned off for the site	Turn CanadaGAP on for the site and select Try again, or Dismiss the run (see 6.71 and 6.74).
The Mexico menu isn't there	The Mexico module is off for the company or the site, QA is off at the site, or the User has no Mexico permission or hasn't signed in since	Turn it on for the company and the site on Overview > Mexico Module (see 6.81), give the User the permissions they need (3.3), then sign out and back in.
Mexico Module: Its state isn't a Mexican state: set it on Add / Change Sites for the time zone.	The site's state, on Add / Change Sites, isn't one of the 32 Mexican states	Enter the state on Add / Change Sites (3.2 of the user manual); its time zone follows.
Harvest Crews: a harvest before the earliest harvest date isn't saved	The site's SENASICA settings refuse a harvest before the field's safety interval ends	Check the date and the field's applications. A Quality Control Manager can choose Ask for a reason under Harvest before the safety interval ends (see 6.82).

Symptom	Likely Cause	Fix
SENASICA Programme: a maintenance internal audit isn’t saved with its evaluator	The same third-party evaluator evaluated for the certificate	A maintenance internal audit is by another evaluator: record the one who did it, or check the certificate’s evaluator (see 6.82).
Hot-Water Treatment: a run is Failed	The dip was too short for the fruit’s shape and heaviest fruit, or the water or pulp was too cold	Type what was done with the fruit (treated again, held, rejected) under If it did not meet the schedule; check the dip times against the Treatment Manual (see 6.84).

8. Appendix

⌂ Contents

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8.1 Glossary

Term	Definition
Disposition	The decision recorded for an inspected lot: Accepted, Accepted with conditions, On hold, Rejected, or Dumped (see 6.7).
Corrective action	A problem followed until it is fixed at the source, with an owner, a due date, the root cause, the action taken, and a verification that it worked (see 6.9).
Claim	A customer’s complaint about product they received, with the amount claimed and the decision (see 6.10).
Scorecard	A grower’s figures over a period, next to the site average (see 6.11).
Calibration	A check of an instrument against a known reference value, recorded with its readings and whether it passed (see 6.12).
Trend alert	A warning that something is getting worse at a site, such as a grower's scores or repeat claims, kept until it no longer applies (see 6.13).

Term	Definition
Grower certificate	A grower's certification, such as GAP or PrimusGFS, kept with its dates and copies; a site can require some for every grower (see 6.15).
Sign-off	A record that a responsible person reviewed an inspection, with who, when and a note (see 6.16).
Audit pack	One PDF of a site’s quality records for a period, made for an auditor (see 6.17).
Qualification	An inspector’s approval, from a training session, to inspect a commodity until a set date (see 6.18).
Action request	A request to a grower to find the cause of a problem and say what they are doing about it, answered on their Action Requests page (see 6.19).
Management review	A meeting, held at planned intervals, where management looks back over a period with its figures and decides what will change; it is recorded with who attended, the conclusions and the follow-up actions (see 6.20).
Approved grower	A grower a Quality Control Manager has approved to supply a site, with what the approval is based on and when it is to be reviewed again (see 6.21).
Controlled document	A procedure, work instruction, form or policy kept in Continuum QC with all its versions, who approved each, its reviews, and who has confirmed reading it (see 6.22).

Term	Definition
Shelf-life sample	Part of a lot kept and checked on set days to see how long the commodity keeps its condition; it reaches its target day, or fails at a check past its limits (see 6.23).
Customer spec	A customer’s requirements for one commodity — the scores, defects and sizes accepted and limits on inspection answers — in versions from a date; a lot is checked against the version in force on its inspection date (see 6.24).
Quality certificate	A numbered PDF issued for a lot going to a customer, with the inspection results, how the lot stood against the customer’s spec and who issued it; kept as issued, emailed to the customer, and corrected by a replacement (see 6.25).
Inspector calibration check	Inspectors score the same sample of a commodity, each on their own, and each is compared with the lead’s reference result within the site’s tolerances; one outside them is out of line until they pass a later check (see 6.26).
Quality objective	A target for 12 months on a figure Continuum QC works out each month, or on the company’s own measure; it is on track while the year to date meets the target, and its owner explains the months it is off track (see 6.27).
Mock recall	A timed exercise on one lot, as if it had to be recalled: traced back to its grower and forward to every customer, with the whole lot accounted for; it passes within the target time (see 6.28).

Term	Definition
Internal audit	An audit of the site against one of its own checklists, answered question by question (conforms, minor or major finding, or N/A), with a score: the share of the questions answered that conform (see 6.29).
Audit finding	A question answered as a minor or major finding, or a finding the auditor raised that isn't on the checklist; it has an owner and a due date and is closed with what was done and the evidence (see 6.29).
External audit	An audit of the site by an outside party: a certification body, a customer, or another such as a regulator. It is recorded once it has happened, with its outcome and the score or grade on the report (see 6.30).
Audit program	An external audit that comes back, such as a certification or a customer's audit, with its certificates and when the next audit is due (see 6.30).
Non-conformance	A requirement an external auditor found not met, graded minor, major or critical. It has an owner and a due date, is answered with what was done and the evidence, and is sent to the auditor until they accept it (see 6.30).
Certification body	The organization that audits the site for a certification scheme, such as PrimusGFS or SQF, and issues its certificate (see 6.30).

Term	Definition
Change control	Making changes that could affect food safety or quality in a planned way: each change is requested, its risk assessed, approved, carried out through actions, put into effect and checked that it worked (see 6.31).
Risk level	How much a change could affect food safety or quality: low, medium or high, with what it affects, set before the change is sent for approval (see 6.31).
QA Setup	The checklist, site by site, of what is still to set up for the quality assurance features: the site's email account, the daily Trend Alerts job, and each feature's settings, records and users (see 6.32).
AQL	Acceptable quality level: the worst average share of defects taken as acceptable over many lots; the standard sampling plans are chosen by it (see 6.33).
Sampling plan	For each commodity, how many units to inspect for a lot of a given size, and the most defects that still accept it (the accept number) (see 6.33).
Cold chain	Keeping produce at the right temperature from receiving to shipping; in Continuum QC, the storage log and the lots' temperatures against their limits (see 6.34).
Non-conforming product	Product found not to meet requirements (a lot, part of one, or stock); each record says what is wrong and what is done with it (see 6.35).

Term	Definition
Concession	Releasing non-conforming product as it is, with the agreement of the customer or of someone in the company with the authority to agree (see 6.35).
Risk register	The list of what could go wrong with food safety or quality, how likely and how bad it would be, and what is done about it, kept up to date by reviews (see 6.36).
Likelihood and severity	How likely a risk is to happen, and how bad it would be if it did, each from 1 to 5; their product is the risk's score (see 6.36).
Header, body and footer	Where an inspection asks a question: the header and footer once per inspection (such as the lot number, Quantity Inspected or Trailer Temp), the body for each sample (such as the defects or a pulp temperature) (see 6.33 and 6.34).
Control chart	A chart of a measure, one point per inspection in the order inspected, with a centre line and control limits that show when the process has changed (see 6.37).
Control limits	The lines 3 sigma above and below a control chart's centre line, set from a baseline period; a point beyond them, a run on one side or a trend is a signal (see 6.37).
Cpk	The capability of a process against a spec: how many times 3 sigma fit between the mean and the nearer spec limit; 1.33 or more is capable (see 6.37).

Term	Definition
MRL	Maximum residue limit: the most of a pesticide a commodity may have for a market, in mg/kg; Lab Results checks each result against it (see 6.38).
Analyte	What a lab test measures: a pesticide, a microbe or a heavy metal (see 6.38).
Recall	Product taken back from customers because it breaks the law or could harm someone; Class I is the most serious. Also a market withdrawal (a minor problem) and a stock recovery (product still at the site) (see 6.39).
Effectiveness check	A call or visit to a recall's customer to see they got the notice and acted on it (see 6.39).
Environmental monitoring	Swabbing the surfaces of the packing house by zone, for pathogens such as Listeria and Salmonella or for ATP, to find contamination before it reaches the product (see 6.40).
ATP	A quick test of how clean a surface is, read at once in RLU (relative light units): the lower, the cleaner (see 6.40).
Vector swab	A swab of a point around a positive one, to find how far the contamination went (see 6.40).
Master sanitation schedule	The list of what is cleaned in each area of the packing house, how, with what and how often (see 6.41).

Term	Definition
Pre-op check	The check of an area before production starts, item by item from its checklist; the area is released for production when every item passes (see 6.41).
Approved label	The label master: a label as approved for a customer and product, with what it must show, item by item, that the labels on the packing lines are checked against (see 6.42).
Start-up check	The first label check on a line each production day, when it starts packing (see 6.42).
Wash point	A place in the packing house where produce meets water (a dump tank, a flume, a spray bar, a hydrocooler, an ice machine), with the sanitizer used and the limits its water is checked against (see 6.43).
ORP	Oxidation-reduction potential: a reading in millivolts (mV) of how strongly the water sanitizes; a wash point can have a lowest ORP (see 6.43).
Load inspection	The check of an outbound load before it leaves: the trailer against the site’s checklist, the reefer against its setpoint, the pulp temperatures of the product, the lots loaded and the seal; the load is then released or rejected (see 6.44).
Critical item	An item of the trailer checklist a trailer must pass: a load whose trailer fails it can’t be released, only rejected (see 6.44).

Term	Definition
Pulp temperature	The temperature inside the produce, read with a probe; on a load, judged against the limits of the lot's commodity on Cold Chain (see 6.34 and 6.44).
Approved supplier	A supplier other than a grower (of packaging, sanitizing chemicals, pest control, lab tests, transport…) that a Quality Control Manager has approved, with or without conditions, once the documents its category needs are in, and that is reviewed again by a set date (see 6.45).
Supplier category	A kind of supplier (packaging, pest control, carriers…), with the documents each of its suppliers must have and whether each expires (see 6.45).
Test piece	A small piece of metal of a known kind and size (ferrous, non-ferrous or stainless steel, in mm) passed through a metal detector in the product, to check that it is detected and rejected (see 6.46).
Reject device	The part of a metal detector that takes the product where metal was detected off the line (an arm, a flap, an air blast), into a locked bin (see 6.46).
Foreign material	Something in the product that shouldn't be there (metal, glass, plastic, stone…); Metal Detection records the metal the detectors find (see 6.46).
Net weight	What a package holds: its weight on the scale (the gross weight) less the empty package (the tare) (see 6.47).

Term	Definition
Legal tolerance (MAV)	How far below its declared net weight one package may be, by the size of the pack: in the United States the maximum allowable variation (MAV) of NIST Handbook 133, Table 2-5 (a 2 lb bag: 0.070 lb; a 1 kg pack: 35.3 g); in Canada the tolerance of the SFCR, Schedule 4, Table 3 (a 1 kg pack: 15 g; a 2 kg pack: 1.5 %, 30 g) (see 6.47).
Give-away	How much the average net weight of a check is over the declared weight, as a percentage: product given away (see 6.47).
Brittle plastic	A hard plastic that breaks into sharp pieces like glass (light covers, scale displays, hard plastic bins, acrylic panels): kept in the register like glass (see 6.48).
Breakage	Glass or brittle plastic broken in the packing house: recorded with the product exposed, cleaned up, and the area cleared by a Quality Control Manager before production resumes (see 6.48).
Retest	A sample of a water test taken again after a failed result, within the days the settings say: a passing retest closes the failed result (see 6.49).
Water source	Where the water the site uses comes from (a well, the city water, a storage tank, an ice machine…), with what its water is used for and the tests it needs (see 6.49).

Term	Definition
Hygiene clearance	The check, after work in a food-contact area, that the tools and parts are accounted for, the area and the equipment are cleaned and sanitized and no glass, plastic, metal or debris is left, before production starts again (see 6.50).
Work order	A request for a repair in the packing house: where, what is to be done and how urgent, then the work done and, in a food-contact area, its hygiene clearance (see 6.50).
Escort	The person who stays with a visitor or contractor in the production or storage areas, recorded at sign-in (see 6.51).
Health questions	The five questions someone answers before entering the production or storage areas (a fever, vomiting or diarrhea, open wounds or infected skin, jaundice, contact with a foodborne illness): a yes keeps them out unless a Quality Control Manager allows it (see 6.51).
Visitor pass	The printed page of a visit: who the person is, the visit, whether they may enter the production areas, and the site’s rules with a line to sign (see 6.51).
Refresher	A course taken again every so many months: due again when that time has passed since the last session the worker passed (see 6.52).
Required from	The day from which a course is required: the workers already at the site take it within its days of that day; a new hire, within its days of being hired (see 6.52).

Term	Definition
Sign-in sheet	The paper list of who attended a training session, signed by each one; a photo or a PDF of it is added to the session (see 6.52).
Field assessment	The assessment of a grower's field before its harvest against the site's pre-harvest checklist, ending approved for harvest, approved with conditions or not approved, valid until a date (see 6.53).
Risk answer	The answer to a checklist question that is a risk (Yes for some questions, No for others): it needs a note saying what was seen, and a field with one is approved only with conditions (see 6.53).
Harvest season	The days a field is harvested this season (Harvest from, and Harvest to when known): in them, the field needs an approval valid that day (see 6.53).
Food defense	Keeping the product safe from someone contaminating it on purpose: the security checks, the incidents and the vulnerability assessment (see 6.54).
Security check	The check of a site against its security checklist, each production day or once a week, each item OK, not OK or N/A (see 6.54).
Vulnerability assessment	The points of the process where the product could be contaminated on purpose, each with its threat, its likelihood times impact and the controls in place, reviewed at least every 12 months (see 6.54).

Term	Definition
Country (of a site)	United States or Canada: it sets the rules and defaults that differ between the two countries. Set on QA Setup, or else from the site's address (see 6.32).
Site group	A named group of sites, such as a region, a commodity or a customer's warehouses, kept by the system administrators on Site Groups; a site can be in several (see 6.56).
Temporary password	The password of a user added by an import: shown once, right after the import, never kept in readable form, and changed by the user at their first sign-in (see 6.55).
Permission set	A named list of pages for one job (Receiving clerk, Packing house checks…), given to many Users at once (see 6.57).
Start page (Today)	The page of what is waiting today at a person's site, from the pages they have, and their pages; growers have their own (see 6.60).
Food Traceability List (FTL)	The FDA's list of foods whose traceability records the Food Traceability Rule requires, such as fresh tomatoes, peppers, cucumbers, leafy greens, herbs and melons; each commodity is marked on it for the whole company (see 6.61).
Critical tracking event (CTE)	A step in a lot's life the FDA asks to be recorded: harvesting, cooling, initial packing, shipping, receiving or transformation (see 6.61).

Term	Definition
Key data element (KDE)	A piece of information the record of a critical tracking event must have, such as the traceability lot code, the quantity, the date, the locations and the reference document; what an event lacks is listed on it (see 6.61).
Traceability lot code (TLC)	The code given to a lot at its initial packing or transformation, usually the QC lot number, which stays with the lot through every shipment and receipt (see 6.61).
Lot code source	Where a traceability lot code was assigned (the location description of that place, or a source reference to it), passed on with each shipment (see 6.61).
Location description	A business's name, phone, physical address (or a farm's coordinates), city, state, zip code and country, as the FDA asks for each location of an event (see 6.61).
Reference document	The document that goes with an event, such as a bill of lading, an invoice or a harvest log, recorded by its type and number (see 6.61).
Transformation	Repacking, relabeling, commingling or cutting, where one or more lots make a new lot with a new traceability lot code (see 6.61).
Electronic sortable spreadsheet	The file of the traceability records of a lot or a period, one row per event, that the FDA can ask for within 24 hours (see 6.61).

Term	Definition
Harvest record	A grower’s record of a harvest delivered to a site, with its field, quantity, harvester and cooling, used when the site records the lot’s initial packing (see 6.62).
Agency connection	The company’s link to a system its buyers use (FoodLogiQ, ReposiTrak, TraceGains…), which receives its traceability events as files, or to USDA Market News, whose prices it reads (see 6.63).
SFTP server’s key	The public key that identifies the other system’s SFTP server (a line from the system or from ssh-keyscan). Files are sent only to a server with that key (see 6.63).
USDA Market News	The USDA Agricultural Marketing Service’s price reports (shipping point and terminal markets), read with a free API key from My Market News (see 6.63).
Buyer submission	What a buyer asks of the company each year in one of its systems: the answers to its questionnaire, the audit information, or both, with the date it is due (see 6.64).
Supplier questionnaire	The questions a buyer asks its suppliers every year in its system (FoodLogiQ, TraceGains, RizePoint, FoodLink, ReposiTrak…): contacts, certifications, recall plan, insurance and the like (see 6.64).

Term	Definition
Answer given before	The company’s answer to a question asked before, for any buyer or year, that comes back in a new submission to be checked as still right or changed (see 6.64).
Audit information	The current certificate and latest audit of each certification program of the sites, from External Audits, given to a buyer (see 6.30, 6.64).
USDA Organic INTEGRITY	The USDA’s database of certified organic operations, with each operation’s certificate and the addenda listing its certified products (see 6.64).
Azzule	The system where PrimusGFS audit reports and certificates are published to the audited operation and its buyers (see 6.64).
Anniversary date	The date by which a certified organic operation updates its certification each year. Organic certificates don’t expire, so Buyer Compliance keeps this date as the certificate’s end (see 6.64).
Line (Market Prices)	One series of prices in a USDA Market News report: the same commodity, variety, package, size, origin and market (see 6.65).
Mostly price	The range at which most of a commodity sold on a report day, when the USDA Market News report gives one beside the low–high range. Market Prices uses the middle of it as the line’s price (see 6.65).

Term	Definition
Price per pound (Market Prices)	A line’s price divided by its package’s weight, when the package says it in pounds or kilograms, so that lines in different packages can be compared (see 6.65).
Moves (Market Prices)	How far a line’s price strays from its average in the period: the standard deviation as a share of the average (see 6.65).
All my sites	The choice, in a Site list, of all your active sites with QA, shown together (see 6.68).
Saved view	A choice of sites kept under a name, offered under My views in every Site list and in the daily digest; each person’s own (see 6.68).
Daily digest	One email a day of what is waiting at a person’s sites, at the hour they choose (see 6.69).
Shipment	One customer’s lots going out together, with the ship date, the order and the bill of lading, each lot with its cases; recorded on Shipments, by releasing a load, or from the shipping system’s file, and numbered S-000001 at each site (see 6.70).
Bill of lading (BOL)	The carrier’s document for a load, by its number; on a shipment, the reference of its lots’ Traceability shipping events (see 6.70).

Term	Definition
Shipped without an inspection	A lot number on a shipment that matches no inspection of the site: a typing mistake, or a lot shipped without being inspected; listed on the Exceptions of Shipments (see 6.70).
Food Safety app (FS app)	Continuum's app for tablets and phones that records food safety logs. At a site with QA, each run becomes a record in one of eight QA modules (see 6.71).
Log (Food Safety app)	One of the 15 kinds of form the Food Safety app offers at a site with QA, such as Pre-op inspection or Metal detector check (see 6.71).
Run (Food Safety app)	What an inspector answers for one area of a log, from start to finish; each run becomes one record in its module, or waits on From the FS App with why (see 6.71).
Location (Food Safety app)	Where on the site, from the site's own list: the app lists rows under their Location, and every form starts by asking it (see 6.72).
Area (Food Safety app)	What is checked at a Location, from the site's own list: the name the app shows for a row, also asked at the top of every form (see 6.72).
TraceGains Gather	TraceGains' side for suppliers, where buyers that use TraceGains see their suppliers' documents. Buyer Compliance uploads the company's certificates and reports to it through its API, with a token from TraceGains Gather Support (see 6.64).

Term	Definition
Operation ID	The number USDA Organic INTEGRITY gives an organic operation. A facility read from INTEGRITY is read by it, typed as its number in the system (see 6.64).
CanadaGAP	The Canadian food safety program for fresh fruits and vegetables. Its manual (version 11.0) asks for the records of Forms A to X; the CanadaGAP module keeps them (see 6.74).
Production site	A grower's field, as on Field Audits, where agronomic inputs are applied and its harvests come from (see 6.77).
Agronomic input	What is applied to a production site: an agricultural chemical (Form H1), or a fertilizer, manure, compost, by-product, mulch or row cover (Form H2).
PCP #	The registration number on the label of an agricultural chemical in Canada (Pest Control Products Act).
PHI (pre-harvest interval)	The days from an application to the earliest harvest, from the label; for manure and compost, the wait before harvest (see 6.78).
EAHD	The earliest acceptable harvest date: an application's date plus its PHI in calendar days. A production site's EAHD is the latest of its applications' (see 6.77).
Re-entry interval (REI)	The hours after an application before people may go into the treated area, from the label.

Term	Definition
Verification (Agronomic Inputs)	The check by someone responsible that an application's record is complete and right: the form's Confirmation Signature / Date (see 6.77).
Confirmation	The person responsible's review of a form's records for a period: Confirmation Signature / Date (ongoing forms) or Confirmation/Update Log (annual forms) (see 6.75).
Reviewed, still valid	An annual assessment confirmed for the season without being entered again, because nothing changed (see 6.79).
Readiness	The share of the CanadaGAP forms that apply to a site that are done this season (see 6.75).
ISO/IEC 17025	The accreditation of testing laboratories; CanadaGAP asks for water tests by an accredited laboratory (see 6.76).
Template (import)	A CSV file with the headings and example rows of a kind of record, to fill in and import (see 6.73).
SENASICA	Mexico's National Service of Agro-Alimentary Health, Safety and Quality, which registers and certifies the units under the SRRC (see 6.81).
SRRC	Contamination risk reduction systems: SENASICA's requirements for the production, harvest and packing of fresh produce, in 15 modules (see 6.82).

Term	Definition
PSRRC (SRRC professional)	The professional approved by SENASICA who does the initial internal audit, validates the hazard analyses and technical plan, and makes technical visits.
TEA (third-party evaluator)	The evaluator approved by SENASICA who does the conformity evaluation, the maintenance audits and the renewal.
BPCo	Good harvest practices: SENASICA's recognition of a harvest service provider and its crews (Module 13; see 6.83).
BUMP	Good use and handling of pesticides: a SENASICA recognition (see 6.82).
COFEPRIS registration (RSCO)	The registration of a pesticide or fertilizer in Mexico, on its label; used where the PCP # is used in Canada (see 6.77 and 6.78).
Safety interval	The days from an application to the earliest harvest of the field, from the label (the PHI, in Mexico's words).
T102-a	The hot-water treatment schedule of USDA APHIS's Treatment Manual for mangoes from Mexico and Central America (see 6.84).
NOM-002-SCFI-2011	Mexico's standard for the net content of packed products: the tolerances Net Weight Checks uses at a site that chooses it (see 6.81).

8.2 Document Revision History

Version	Date	Summary
2	2026-10-14	Lot disposition (6.7); inspection change history (6.8).
3	2026-10-14	Corrective actions (6.9).
4	2026-10-14	Customer claims (6.10); corrective actions can be raised from a claim.
5	2026-10-14	Grower Scorecards (6.11).
6	2026-10-14	Calibration Records (6.12); corrective actions can be raised from a failed calibration.
7	2026-10-14	Trend Alerts (6.13), with a daily email to Quality Control Managers.
8	2026-10-14	QA Dashboard (6.14). Trend alerts count a lot as held even if it was released later (6.13).
9	2026-10-14	Grower Certificates (6.15), with warnings on lots (6.7), trend alerts (6.13) and a QA Dashboard tile (6.14).
10	2026-10-14	Inspection Sign-off (6.16), shown on Edit Quality Inspections (6.6), the inspection report, Inspection Change History (6.8), Trend Alerts (6.13) and the QA Dashboard (6.14).
11	2026-10-14	Audit Pack (6.17), with the Audit pack button on the QA Dashboard (6.14).

Version	Date	Summary
12	2026-10-14	Inspector Training (6.18), with warnings on Edit Quality Inspections (6.6), Lot Disposition (6.7) and Inspection Sign-off (6.16), training alerts (6.13), a QA Dashboard tile (6.14) and an Audit Pack section (6.17).
13	2026-10-14	Grower Action Requests (6.19), with the growers' Action Requests page, requests from lots (6.6, 6.7), claims (6.10), certificates (6.15) and scorecards (6.11), an overdue alert (6.13), a QA Dashboard tile (6.14) and an Audit Pack section (6.17).
14	2026-10-14	Management Review (6.20), with continuing a review action as a corrective action (6.9), review alerts (6.13), a QA Dashboard tile (6.14) and an Audit Pack section (6.17).
15	2026-10-14	Approved Growers (6.21), with warnings on Edit Quality Inspections (6.6) and Lot Disposition (6.7), the approval on scorecards (6.11) and certificates (6.15), approval alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and the counts in management reviews (6.20).
16	2026-10-14	Controlled Documents (6.22), with document alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and the counts in management reviews (6.20).
17	2026-10-15	Shelf Life (6.23), with samples from Edit Quality Inspections (6.6) and Lot Disposition (6.7), corrective actions from failed samples (6.9), a grower's samples on scorecards (6.11), shelf-life alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and the counts in management reviews (6.20).

Version	Date	Summary
18	2026-10-15	Customer Specifications (6.24), with how a lot stands on Edit Quality Inspections (6.6) and Lot Disposition (6.7), the customer's spec on claims (6.10), customer-spec alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and the counts in management reviews (6.20).
19	2026-10-15	Quality Certificates (6.25), with certificate links on Edit Quality Inspections (6.6), claims (6.10) and Customer Specifications (6.24), certificate alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and the counts in management reviews (6.20).
20	2026-10-15	Inspector Calibration (6.26), with calibration on Inspector Training (6.18), calibration alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and the counts in management reviews (6.20).
21	2026-10-15	Quality Objectives (6.27), with corrective actions raised from an objective (6.9), objective alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and a topic in management reviews (6.20).
22	2026-10-15	Mock Recalls (6.28), with mock recalls on Edit Quality Inspections (6.6), corrective actions raised from an exercise (6.9), mock recall alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and a topic in management reviews (6.20).

Version	Date	Summary
23	2026-10-15	Internal Audits (6.29), with corrective actions raised from a finding (6.9), internal audit alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and a topic in management reviews (6.20).
24	2026-10-15	External Audits (6.30), with corrective actions raised from a non-conformance (6.9), external audit alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and a topic in management reviews (6.20).
25	2026-10-16	Change Control (6.31), with corrective actions raised from a change that didn't work (6.9), change control alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and change control figures in management reviews (6.20).
26	2026-10-16	QA Setup (6.32), with the gear menu (2.3), the site settings (3.2), the line on the QA Dashboard (6.14), troubleshooting (7.3) and the glossary.
27	2026-10-16	QA Setup: copying from another site (6.32), with troubleshooting (7.3).
28	2026-10-16	Sampling Plans (6.33), with the line on Edit Quality Inspections (6.6), the warning on Lot Disposition (6.7), sampling plan alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), sampling figures in management reviews (6.20) and copying sampling plans (6.32).

Version	Date	Summary
29	2026-10-16	Cold Chain (6.34), with the line on Edit Quality Inspections (6.6), the warning on Lot Disposition (6.7), cold chain alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), cold chain figures in management reviews (6.20) and copying limits and places (6.32).
30	2026-10-16	Non-Conforming Product (6.35), with the lot's records on Edit Quality Inspections (6.6), the warning on Lot Disposition (6.7), a new corrective action source (6.9), logging from claims (6.10) and cold chain readings (6.34), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and the figures in management reviews (6.20).
31	2026-10-16	Risk Register (6.36), with a new corrective action source (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and a management review topic, Risks and opportunities (6.20).
32	2026-10-16	Cold Chain storage readings from the app's inspections: Temperature questions and the storage log (6.34), the lot of a reading on Non-Conforming Product (6.35); What the app records and the lot size question from the header or footer on Sampling Plans (6.33); the Audit Pack (6.17), copying (6.32), troubleshooting (7.3) and the glossary.
33	2026-10-16	Control Charts (6.37), with the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17) and the figures in management reviews (6.20).

Version	Date	Summary
34	2026-10-16	Lab Results (6.38), with the lot's tests on Edit Quality Inspections (6.6), the warning on Lot Disposition (6.7), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20), copying analytes, markets and limits (6.32), logging non-conforming product from a failed test (6.35) and the failed tests on the Risk Register (6.36).
35	2026-10-17	Recalls (6.39), with the lot's recalls on Edit Quality Inspections (6.6), the warning on Lot Disposition (6.7), starting a recall from a claim (6.10), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20), mock recalls (6.28), starting one from non-conforming product (6.35) and from a failed lab test (6.38).
36	2026-10-17	Environmental Monitoring (6.40), with the warnings on Edit Quality Inspections (6.6) and Lot Disposition (6.7), a corrective action from a positive (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20), QA Setup (6.32) and starting a recall from a positive (6.39).
37	2026-10-17	Sanitation (6.41), with a corrective action from a pre-op check (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).

Version	Date	Summary
38	2026-10-17	Label Checks (6.42), with a corrective action from a wrong label (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
39	2026-10-17	The QA chapters became this QA addendum (A.1), with the QA menu (A.2) and what QA adds to the QC pages (A.3); the menu paths now start with QA, and The QA menu isn't there (7.3).
40	2026-10-18	Wash Water (6.43), with the lot's wash water checks on Edit Quality Inspections (A.3), a corrective action from a reading out of range (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
41	2026-10-18	Load Inspections (6.44), in the QA menu (A.2), with the loads of a lot on Edit Quality Inspections (A.3), a corrective action from a load with problems (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
42	2026-10-18	Approved Suppliers (6.45), with a corrective action from a supplier review (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32); a wash point's sanitizer supplier on Wash Water (6.43), a load's carrier on Load Inspections (6.44), and the QA menu section Growers, suppliers and inspectors (A.2).

Version	Date	Summary
43	2026-10-18	Metal Detection (6.46), with the lot's metal detector checks on Edit Quality Inspections (A.3), a corrective action from a failed check (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
44	2026-10-18	Net Weight Checks (6.47), with the lot's net weight checks on Edit Quality Inspections (A.3), a corrective action from a failed check (6.9), the alert (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
45	2026-10-18	Glass and Brittle Plastics (6.48), with the breakages a lot was exposed to on Edit Quality Inspections (A.3), a corrective action from a breakage (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
46	2026-10-18	Water Testing (6.49), with a corrective action from a failed result (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
47	2026-10-18	Maintenance (6.50), with a corrective action from a work order (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).

Version	Date	Summary
48	2026-10-18	Visitors and Contractors (6.51), in a new section of the QA menu, People and security (A.2), with the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
49	2026-10-18	Employee Training (6.52), the first page of the People and security section of the QA menu (A.2), with the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
50	2026-10-18	Field Audits (6.53), in the Growers, suppliers and inspectors section of the QA menu (A.2), with the links under an inspection (A.3), a new source of corrective actions (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).
51	2026-10-18	Food Defense (6.54), in the People and security section of the QA menu (A.2), with the links under an inspection (A.3), a new source of corrective actions (6.9), the alerts (6.13), a QA Dashboard tile (6.14), an Audit Pack section (6.17), the figures in management reviews (6.20) and QA Setup (6.32).

Version	Date	Summary
52	2026-10-18	USA and Canada: the country of each site (6.32), which sets the rules and defaults that differ: the net weight tolerances (6.47), the regulator told of a recall, a claim or a food defense incident and a mock recall at least every 12 months in Canada (6.10, 6.28, 6.39, 6.54), the °F or °C a site starts with (6.34, 6.43, 6.44), and the usual lists offered (label items, certificates, markets, programs, courses, water tests); the regulator's file (CSV) of a trace (6.28, 6.39); residues found with no limit (6.38); temperature limits in the site's unit (6.24, 6.25, 6.37); sanitizer registration numbers (6.41, 6.43, 6.45); records kept: readings voided, not removed (6.34), and files removed from a record, on QA Setup (6.32); and the visitors' privacy: the notice at sign-in and the health answers cleared some months later (6.51)
53	2026-10-22	The traceability module: importing sites, growers and users (6.55), site groups (6.56), permission sets (6.57), Site Setup (6.58), Company Overview (6.59), Today (6.60), traceability events for the FDA Food Traceability Rule, with the trace of a lot and the FDA spreadsheet (6.61), the growers' harvest records (6.62) and the agency connections (6.63); mock recalls and recalls with the traceability events (6.28, 6.39)

Version	Date	Summary
54	2026-10-23	The QA menus: Continuum QC with the QC menus after signing in, and the switch ⇄ QA to Continuum QA, with the QA pages in seven menus (A.2), and the menu paths that go with them; Today’s All my sites, for someone with many sites (6.60); Buyer Compliance, the buyers’ yearly supplier questionnaires and the facilities’ certificates (6.64); Market Prices, the USDA Market News prices as a report (6.65)

Version	Date	Summary
55	2026-10-27	A company with many sites: Cross-site Reports (6.66), Search (6.67), Choosing Sites and Saved Views, with the site list on the menu bar (6.68), and the Daily Digest (6.69); the QA Dashboard, Company Overview and Today for many sites (6.14, 6.59, 6.60); deciding, changing or asking many at once on Lot Disposition, Corrective Actions, Grower Certificates and Inspection Sign-off (6.7, 6.9, 6.15, 6.16); QC Managers responsible for site groups, customers and varieties in the import, the Users' pages on Permission Sets, and a site's setup or one feature's settings applied to many sites (6.55-6.58); Shipments: a customer's lots at once, checked against its spec, from the page, a released load or the shipping system's file, with Lots for an order, Import Customers, the Exceptions and the Traceability shipping events (6.70); shipments on Customer Specifications, Quality Certificates, Load Inspections, Traceability Events, Customer Claims and Mock Recalls (6.24, 6.25, 6.44, 6.61, 6.10, 6.28); Added 6.71 From the FS App and 6.72 Locations, Areas and Equipment; updated 6.12, 6.40, 6.41, 6.43, 6.46, 6.48, 6.50 and 6.51 for the records the Food Safety app sends, 6.17 Audit Pack for the Location and Area answered in the app, and 6.32 QA Setup for the new checklist item and the copy of the app's setup; 6.13 Trend Alerts: the buyer compliance alerts; 6.63 Agency Connections: the Market News API key; 6.64 Buyer Compliance: USDA Organic INTEGRITY read through its API, the TraceGains tab, and the counts and lists changed since revision 54

Version	Date	Summary
56	2026-10-30	When the TraceGains Gather API token runs out: its date with the token, Save the date, the notes, a Trend Alert and the Administration card (6.64, 6.13, 7.3); TraceGains API Support's address, APISupport@tracegains.com (6.58, 6.64, 7.3)
57	2026-10-30	Importing Records from a File (6.73): lab results, water tests, environmental monitoring, cold chain readings, weight and metal detector checks, grower certificates, approved suppliers and growers, employee training, calibration records, maintenance, controlled documents, traceability locations and growers' harvest records; Traceability's import with its columns and the nightly job (6.61)
58	2026-11-19	The CanadaGAP module: added 6.74 CanadaGAP Module, 6.75 CanadaGAP Programme, 6.76 CanadaGAP Forms, 6.77 Agronomic Inputs, 6.78 Input Product Library, 6.79 CanadaGAP Assessments and 6.80 Pest Program. The Mexico module: added 6.81 Mexico Module, 6.82 SENASICA Programme, 6.83 Harvest Crews and 6.84 Hot-Water Treatment, and the Mexico pages of 6.77, 6.78 and 6.80. Updated A.1, A.2 for the CanadaGAP and Mexico menus, 6.13 Trend Alerts and 6.17 Audit Pack for their alerts and sections, 6.28 Mock Recalls (the lot numbers suggested as you type), 6.32 QA Setup for their cards, 6.61 and 6.62 for the harvest check, 6.71 for the app's CanadaGAP logs, 6.73 for the CanadaGAP imports, 7.3 and 8.1.