

SOURCE NY REGISTRATION—A Do-it-Yourself Guide

Thank you for your interest in Source NY! The purpose of this guide is to help you:

- ✓ Get your business on the map **(STEP 1)**
 - ✓ Complete your profile **(STEP 2)**
 - ✓ Find yourself on the map **(STEP 3)**
 - ✓ Map a supply chain **(STEP 4)**
- ✓ Post in our grower/producer classifieds **(STEP 5)**

LET'S GET STARTED!

PART 1: REGISTER

1. Go to www.source-ny.org
2. Click "Register" **NOTE: this a unique registration link and you MUST begin with this Registration link on the www.source-ny.org page in order to get onto Source NY map.**
3. Select "Individual or Business." Be advised: Even if you are an academic institution or non-profit, select "Individual or Business."
4. Complete the short questionnaire in the box.
5. Verify your email address — you should see an email from Sourcemap in your inbox.
 - a. If you didn't get an email:
 - Check your spam box if you don't see it in your inbox
 - return to your profile page and click "send new verification email."
6. Return to your browser and refresh the page
7. You should now see the following on your "profile page:"
 - **A blue Source NY Tile**
 - **A black & white 'Make a New Map' tile**
 - a. NOTE: if you do not see these tiles:
 - Double check to make sure you followed the "Register" link from www.source-ny.org
 - Beta trial participants will have to be manually migrated to the new map
 - If you previously registered, please contact Becca at 518 797 5100 or rplatel@careyinstitute.org for help
 - **In the top right corner: your email address. Click on it to see:**
 - A link to get back to your profile page at any point
 - A 'Help' button (for help with the Open Sourcemap Platform)
 - A Log off button
 - **A left side bar with your basic account details. You can:**
 - Add a logo: Click "Edit Logo" to add a logo image
 - Change the e-mail and password for your Source NY account
 - Connect to your Instagram account, if applicable

PART 2: COMPLETE YOUR PROFILE (necessary for 'getting on the map')

1. Click on Source NY Tile to open the profile survey
 - a. **Helpful hints to avoid frustration!**
 - If you click off the white question box, the box will close and their answers will **not** be saved, so be careful not to click off the white box 😊
 - If you include any website address (your website, Facebook or other), you must include the http://
 - Your profile answers are visible to anyone looking at the map, so, if you are not comfortable answering certain questions, that's fine, however we **will not** publish the answers and/or advertise them in any way.
 - **Remember: the more information you enter, the more valuable the platform becomes!**
 - b. Begin answering the questions: Customized questions appear based on what 'business type' you select. If you have multiple businesses, start with the primary business you want market on Source NY (we are working on a solution to select multiple business.)
 - a. When answering questions about what you grow or what materials you use:
 - Directory Search Tool pulls from answers to all questions in the profile; when deciding how to answer questions, imagine that you are searching the map for a product or material: what keywords would you use to search?
 - The more specific the better, e.g. use "rye" instead of "grain"; use "cascade" instead of just "hops." And, list the names of the varieties, not just how many you use or grow.
 - b. What do you mean: *Are you interested in working directly with a farmer/beverage producer?*
 - The answer to this question helps us identify businesses who might like to participate in an upcoming "Brewer-Distiller CSA" project.
 - Saying "Yes" will signal to another user any of the following:
 1. that you are open to being contacted via the contact info you provided
 2. that you are open to talking with another user about raw materials you grow or use and/or would like to grow or have available
 3. that you are open to considering and/or at least discussing contracts
 - c. When you done, click 'Save Profile'
 - If it does not save, correct the highlighted problems and save again
 - d. To edit your profile, click on the Source NY tile, make your changes, and 'Save'

STEP 3: FIND YOUR BUSINESS ON THE MAP

1. Return to www.source-ny.org via the link on profile page
2. Find yourself on the map: try searching with different keywords
3. Search for other businesses by name, business type, crops, products, etc.
4. Don't like what you see on your profile? Navigate back to your Profile Page (link under your email address in top right corner); click on the Source NY tile, make your changes, and 'Save.'

STEP 4: MAP A SUPPLY CHAIN

1. Decide what kind of map you are making and who you are making it for—do you want to use it to help you market your products or perhaps to learn more about the distribution of your suppliers and retailers? For some ideas, explore the supply chain map feed on www.source-ny.org
 - a. Key questions:
 - Is it a supply chain map of your entire operation, from raw materials, to equipment?
 - Is it a supply chain map of all ingredients you source from NYS?
 - Is it a supply chain of the ingredients you used for a specific product?
 - Are you a farmer? Tell us who you sell your crops to or where you get them processed.
 - b. Navigate to your profile page (click on your email address in top right corner) and select the “Map a New Supply Chain” tile
 - Want a tour? Read Sourcemap’s Help Section for instructions using the mapping tool here: <http://www.sourcemap.com/help>
 - c. Complete the text box
 - Map Name & Description (explain the Map Name will appear on the Supply Chain Map feed on the website, therefore:
 1. For the map name, we suggest the following format: Your Business’s Name / map focus, e.g. a specific product, a specific group of businesses you work with, e.g. all of your hop supplies; your NYS supply chain; your out-of-state supply chain.
 - a. For example: Helderberg Brewery NYS IPA or Helderberg Brewery New York State Supply Chain Map
 2. For the Map Description, include a few sentences to explain the map
 - a. E.g. “The farmers who grow the grain and hops that we use in our NYS IPA.”
 - b. E.g. These are the retail outlets where you can find our products.
 - c. E.g. This is a map of every business we work with — our entire upstream and downstream supply chain.
 3. To edit map Title and Description at any time:
 - a. Select the map you want to edit from your profile page
 - b. Click the pen icons on the left sidebar and the text boxes will be editable .
 - c. Click Save.
 - d. Open the Map Key by clicking the ‘I’ button on the tool bar
 - At any point, feel free to click the ‘Need Help? Take a Tour’ link at the bottom of the map key. This will bring you to a Sourcemap-designed e-tutorial.
 - e. Start by adding yourself to the map
 - Select your business type on the Map Key: Note that farmers are suppliers and businesses like mills and malt houses are processors;

- Complete the text box to add information about you: (or goal is for this to pre-load – in the next version!)
 1. Keep it simple:
 - a. Your Business Name.
 - b. What you are providing (e.g. a service) or producing (the raw materials or the final product)
 - c. Your address.
 2. Click on your point—you can add pictures and videos of your operation to make your map more informative
- Add your upstream suppliers or downstream customers
 1. In the left side bar, you can add pictures and videos of your suppliers to make the map more informative
- To connect points:
 1. Select an upstream supplier or processor
 2. Click the “Connect Point” button on the left sidebar
 3. Navigate to business you are connecting to and click the point—a link will appear.
 4. To delete points or links: select the item, click the “delete” button on the left sidebar

STEP 5: POST IN OUR GROWER/PRODUCER CLASSIFIEDS

1. Navigate to www.source-ny.org .
2. Scroll down to the Classified Section.
3. Complete the form.
 - a. Tips for maximizing ad appeal:
 - include variety, the item/s you are selling or buying, how much you have available, and any specific quality requirements (e.g. Is it tested? Do you need it to be tested? Etc.)
 - Include your preferred contact information, email or phone
4. Click “Submit” and your ad will appear shortly after that.
5. Your ad will also be included in the Carey Institute’s weekly e-mail update.

QUESTIONS, TROUBLESHOOTING, SUGGESTIONS?

Contact Rebecca Platel at 518 797 5100 or rplatel@careyinstitute.org