

# Outline of Steps – Day in the Life (1)

1. Sales or Opportunity Analysis Request
2. Annual / Quarterly Planning With Manufacturer
3. Contract Request
4. Contract Creation in System X
5. Contract Loaded to SharePoint
6. Retail Services Request, with Store List Attached
7. Manufacturer Approval of Contract
8. Sales Presents Contract to Customer
9. Customer Requests Change

## **Outline of Steps – Day in the Life (2)**

10. Manufacturer Approval of Change
11. Customer Accepts
12. Deductions: Monthly Tracking, Proof of How Money Was Spent
13. Pricing Report / Survey
14. Sales Call Reporting
15. Manufacturer and Retailer Contact Lists
16. Price List Updates
17. New Item Speed to Shelf Reports
18. Retailer Add/Drop Lists



New York Home

Search bar with arrow

Modify My Page

- Documents**
- General Client Information
- Promotion & New Item Planners
- AE Weekly
- Question Tracker
- Pricing Reports
- Deductions
- A/R Log
- Shared Documents
- Pictures**
- Logo Library
- Lists**
- Contracts Request
- Retail Service Requests
- Category Management Requests
- Client Contacts
- Client Calendar
- Order Error Issue Log
- Contract Request Exception Log
- Discussions**

**Announcements**

**Welcome Meeting** 5:32 AM  
 by Ave  
 We're l  
 Thanks

▣ Add new announcement

**MSNBC Sports News**

- Raptors make Bargnani first pick in draft
  - Opinion: Blazers score big in draft; Sonics stink
  - Active Blazers end up with 4 1st-rounders
  - Sox give Pedro rude welcome, win 11th straight
  - Roddick survives, while Federer thrives
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**MSNBC Business News**

- Stocks recover from Tuesday's sharp sell-off
  - Cattle battle: Big dairies irk organic farmers
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**Divisional Customer Navigation**

- New York Metr**
- Customer
    - A8
    - Ac
    - As
    - C8
    - D'
    - Du
    - Fo
    - Ge
    - Gi
    - Gr
    - Ha
    - Je
    - Ke
    - Ki
    - Ki
    - Kr
  - Customer
    - Pa
    - Ri
  - Customer
    - W
    - W
    - W

**Links**

- C
- M
- C
- C
- C

# New York Metro-Mid-Atlantic Division Category Management Requests: New Item

Save and Close | Attach File | Go Back to List

Name of Requestor \*

Date Requested \*

Date Needed \*

Title \*

Customer \*

Category \*

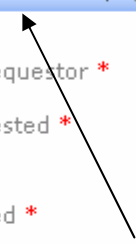
Client \*

Brand \*

Product

UPC

Objective \*



Help



...es/SalesTeam/EasternRegion/NY-Mid-Atlantic/Lists/Category%20Management%20Requests/NewForm.aspx?Source=http%3A%2F%2Fsp...

If you know the UPC of the product please provide it. If you know the manufacturer code please provide.

Customer \*

Objective \*

**A** **A** | **B** / **U** | [List Icons] | [Text Icons] | [Link Icon] [Undo] [Redo]

Why do you need this data?

Time Frame \*

**A** **A** | **B** / **U** | [List Icons] | [Text Icons] | [Link Icon] [Undo] [Redo]

Remaining Market Data

Do you need remaining market data?

Type of Report

**A** **A** | **B** / **U** | [List Icons] | [Text Icons] | [Link Icon] [Undo] [Redo]

Do you want a Trak, a ranking report, a specific template, etc.?

Progress

Date Completed

Enter date in M/D/YYYY format.

Completed By



# New York Metro-Mid-Atlantic Division Category Management Requests

- Items
- to My Links
- rt me
- ort to
- adsheet
- ify settings
- columns

New Item | Filter | Edit in Datasheet

Name of Requestor	Date Requested	Title	Category	Date Needed	Brand	Time Frame	Objective	Remaining Market Data	Type
-------------------	----------------	-------	----------	-------------	-------	------------	-----------	-----------------------	------

The A

A-Tea

Dan B



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New York Home

Search bar with arrow

Modify My Page

Documents

- General Client Information
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- AE Weekly Question Tracker
- Pricing Reports
- Deductions
- A/R Log
- Shared Documents

Pictures

- Logo Library
- Contracts Request

Requests

- Retail Service Requests
- Category Management Requests
- Client Contacts
- Client Calendar
- Order Error Issue Log

Contract Request Exception Log

Discussions

Announcements

**Welcome Meeting** [Redacted] 5:32 AM

by Ave [Redacted]

We're l [Redacted]

Thanks [Redacted]

[Add new announcement](#)

MSNBC Sports News

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- Opinion: Blazers score big in draft; Sonics stink
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    - Ke
    - Ki
    - Ki
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  - Customer
    - Pa
    - Ri
  - Customer
    - W
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    - W

Links

- C [Redacted]
- M [Redacted]
- C [Redacted]
- C [Redacted]
- C [Redacted]



New York  
Promotion & New Item Planners: Upload Document

Save and Close | Go Back to Document Library

Overwrite existing file(s)?

Description \*

Name \*

Upload Multiple Files...

Client \*

Market \*  N/A

Planner Date \*

Enter date in M/D/YYYY format.

Document Type \*

\* indicates a required field



Microsoft Excel -

File Edit View

Type a question for help

**B** *I* U | [Text Alignment Icons] | [Grid/Print Icons]

A2

## Annual Plan Calculator

Customer: [Redacted]

Annual Budget

Business: Wh

DT Rate/Lb.: \$0.08

Preliminary Ann

Annual Fund Balance: \$4, [Redacted]

(Includes reduction for "Other" VDT Ex [Redacted])

Total Estimated

Defaults to Stra

Adjust as neede

Promotion D

Promotion Nam

Targeted Price P

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Promoted Volun

/ol. Receiving Pri

total Price Pt. S

ump-Sum For M

total Promotion

Fu

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	January	February	March	April	May	June	July	August	September	October	November	December	Annual Total
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]



New York Home

Search bar with arrow

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  - Customer
    - W
    - W
    - W

**Links**

- C
- M
- C
- C
- C

# New York Contracts Request: New Item

Save and Close | Attach File | Go Back to List

Description \*

Contract Type \*

Planner is Attached

Allowance Type

Assigned To

Client \*

Market \*

Customer \*

3Q06 C

Promo

Bill

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Sca

Cou

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N/A

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Co

Admin receives an Alert.



- We
- We
- WH

Date Contract Needed By AE \*

Enter date in M/D/YYYY format.

Status \*

Requesting ▾

- Requesting
- Working
- Completed

Comment

Allowance Amount

Allowance Unit of Measure

A A | B I U | [bulleted list] [numbered list] [list with icons] | [text color] [background color] [bold] [italic] [underline] [link] [unlink]

Performance Requirements

A A | B I U | [bulleted list] [numbered list] [list with icons] | [text color] [background color] [bold] [italic] [underline] [link] [unlink]

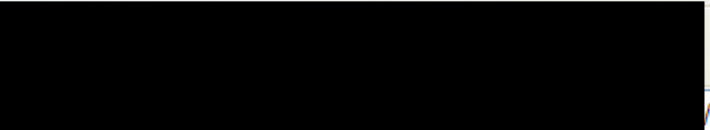
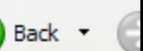
Planned or Committed?

Case Caps, [redacted] to for retailer.

Committed o [redacted] e orders until they

Date Retailer Can First Order

Enter date in



Address http://

/ContractsRqst/NewForm.aspx?Source=http%3A



2F



Link

Planned or Committed?

Case Caps

Committed become co

Date Retailer Can First Order

Enter date

Ship Date

Enter date

Description of Promoted Product or New Item

Please mak

Add Related Issue

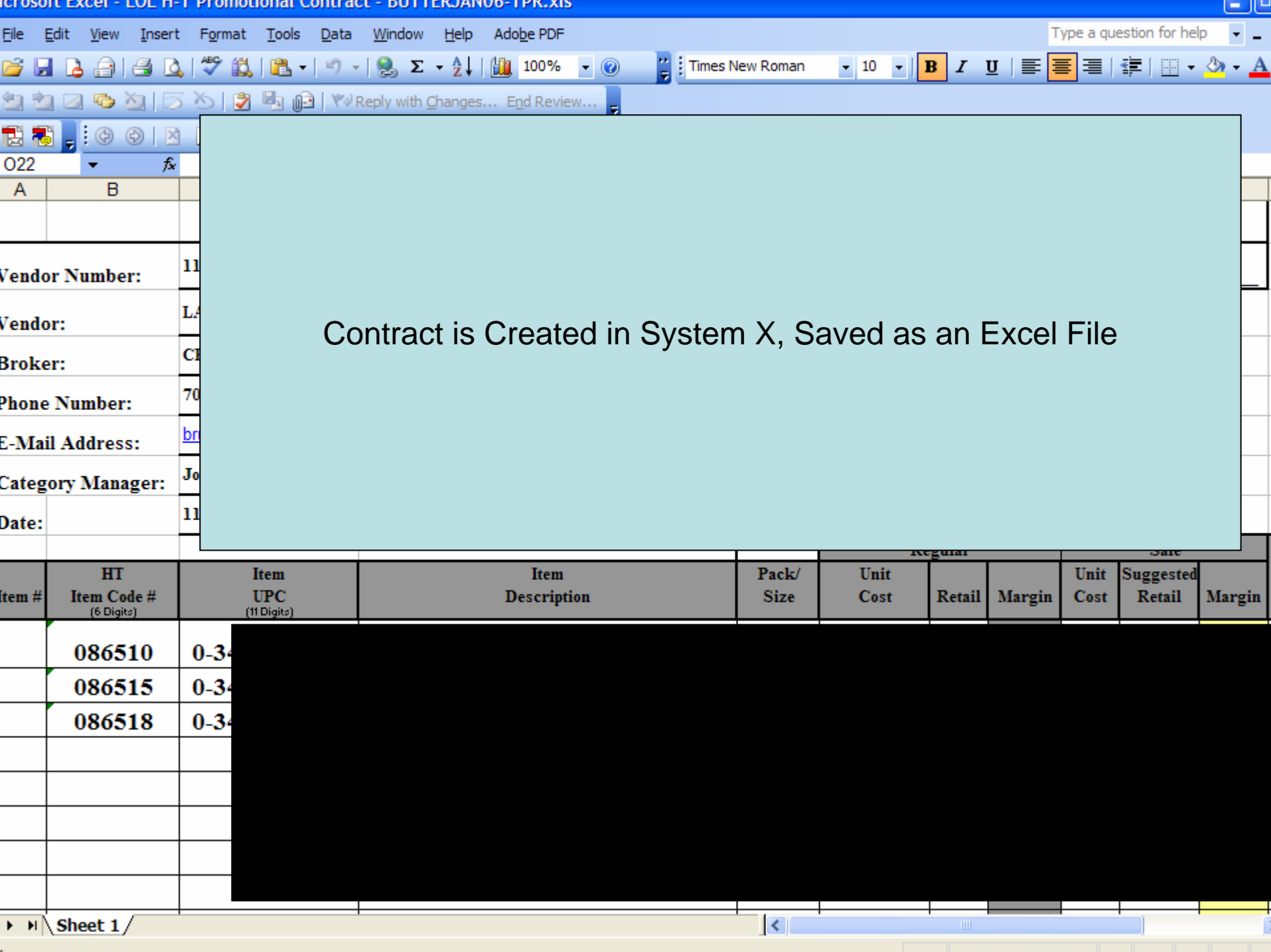
Type the Is

\* indicates a required field



ed to for retailer.

ve orders until they



022	
A	B
Vendor Number:	11
Vendor:	LA
Broker:	CE
Phone Number:	70
E-Mail Address:	br
Category Manager:	Jo
Date:	11

Contract is Created in System X, Saved as an Excel File

Item #	HT Item Code # (6 Digits)	Item UPC (11 Digits)	Item Description	Pack/ Size	Regular		Sale		
					Unit Cost	Retail	Margin	Unit Cost	Suggested Retail
	086510	0-34							
	086515	0-34							
	086518	0-34							

New York Metro-Mid-Atlantic Division

# Contracts Request: 3Q06 COS NY&MA Contracts

New Item | Edit Item | Delete Item | Alert Me | Go Back to List

Description: 3Q06  
 Contract Type: Pr  
 Planner is Attached: Ye  
 Allowance Type: Bil  
 Assigned To: Ni  
 Client: CH  
 Market: N/  
 Customer: (P  
 Date Contract Needed By AE: 7/  
 Status: Re  
 Comment: Pla  
 Pla  
 Th

Allowance Amount:  
 Allowance Unit of Measure:  
 Performance Requirements:  
 Planned or Committed?:  
 Date Retailer Can First Order:  
 Ship Date:  
 Description of Promoted Product or New Item:

Contracts are completed (Through forms package) and status to completed

Issue ID : 38

Created at 6/20/2006 12:11 PM by Brady, Daniel

Trusted sites

start



Contracts Request - ...

Inbox - Microsoft Out...

Microsoft PowerPoint ...

1:14

- Documents**
- Retailer General Information
- Category Management Results
- New Item Reports
- Add\Drop Lists
- Pictures**
- Logo Library
- Lists**
- Calendar
- Contacts
- Tasks
- Contract Management
- Discussions**
- General Discussion
- AE Weekly Questions
- Surveys**

Customers A-K (Others) / Acme Markets

**Announcements**

There are currently no active announcements. To add a new announcement, click "Add new announcement" below.

[Add new announcement](#)

**Events**

There are currently no upcoming events. To add a new event, click "Add new event" below.

[Add new event](#)



Lead-it Nav  
Acme Marke

**Links**

There are cur  
display. To ad  
below.

[Add new lin](#)

MSNBC Wea

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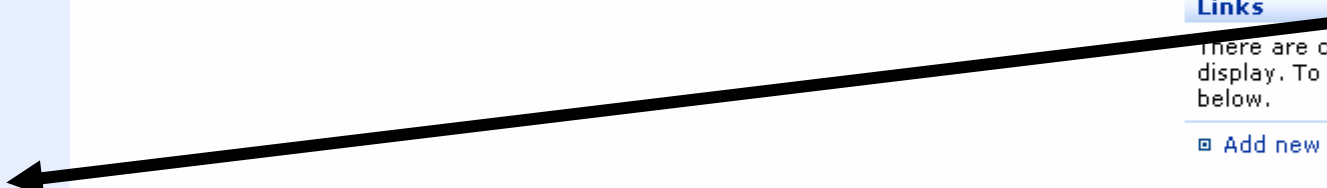
Light  
RAIN

Humidity: 87%

79°/69°

All temps shown in:  F°  C°

Contract is now loaded to SharePoint. Sales Person receives alert and approves contract





Save and Close | Attach File | Delete Item | Go Back to List

Item Title \*

3Q0

Item Type \*

Prof

Assigned To

Bro

Item Status \*

Proposed

Comment

[Empty text area with scrollbars]

Account Executive

Da

Customer Manager

[Empty]

Client \*

CH

Brand Segment

[Empty]

1st Ship Date \*

7/1

Customer \*

Ac

Department

Gr

Buyer

Na

Appointment Date

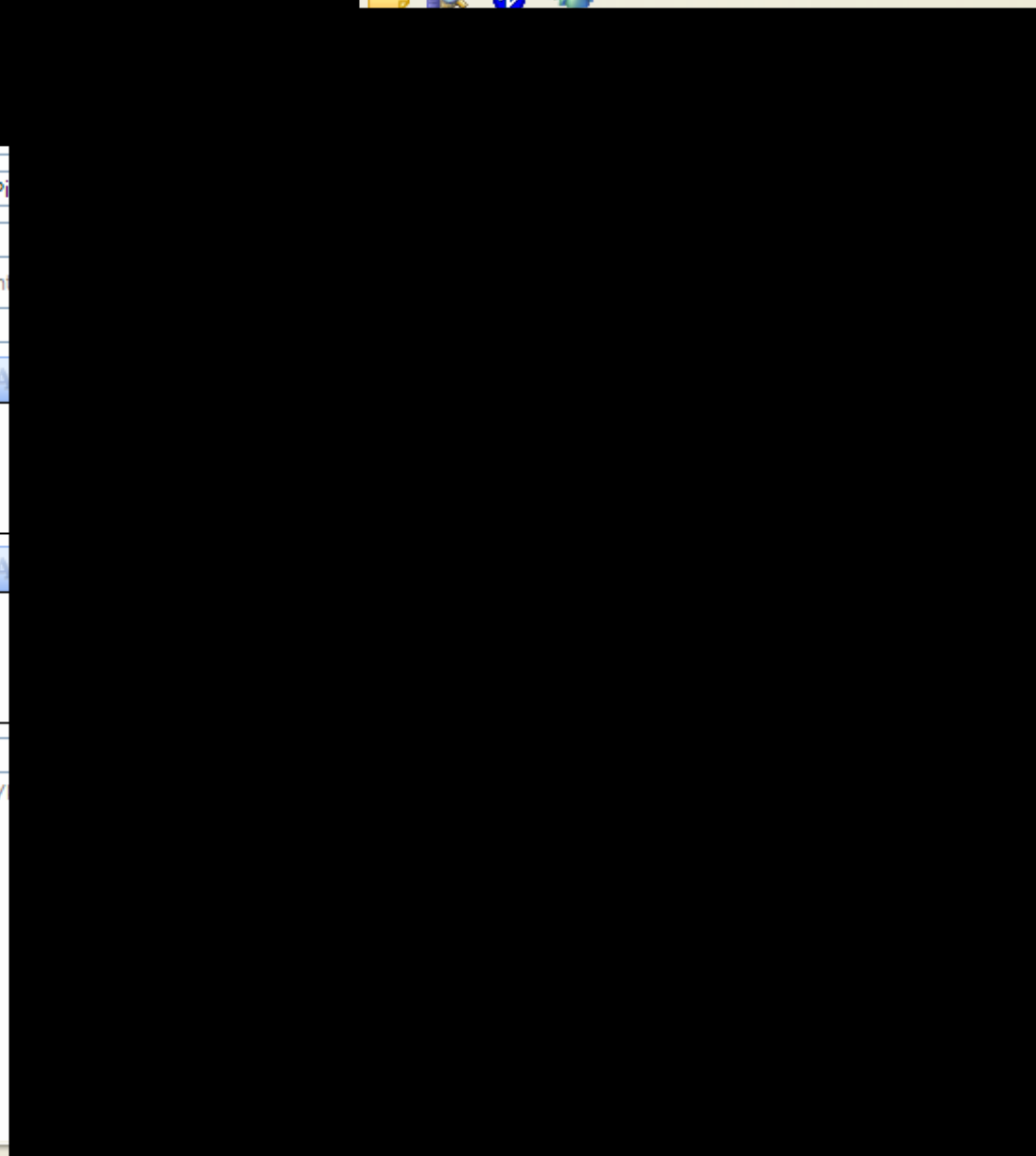
[Empty]

Ent



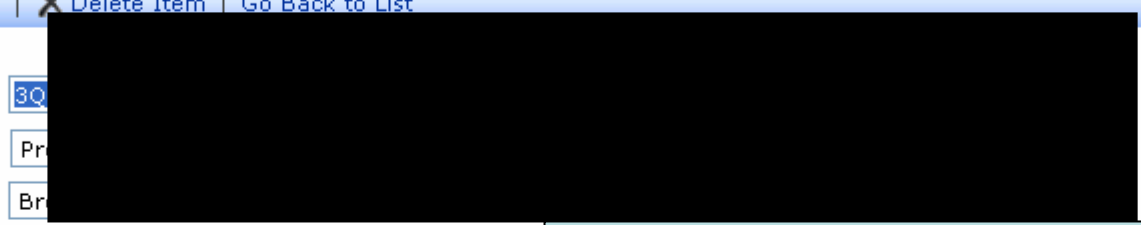
Buyer	<input type="text"/>
Appointment Date	<input type="text"/>
Retailer Status	<input type="text"/>
Retailer Commitments / Comments	<input type="text"/>
Actual Performance	<input type="text"/>
Add Related Issue	<input type="text"/>
	Type

\* indicates a required field



Save and Close | Attach File | Delete Item | Go Back to List

- Item Title \*
- Item Type \*
- Assigned To
- Item Status \*
- Comment
- Account Executive
- Customer Manager
- Client \*
- Brand Segment
- 1st Ship Date \*
- Customer \*
- Department
- Buyer
- Appointment Date



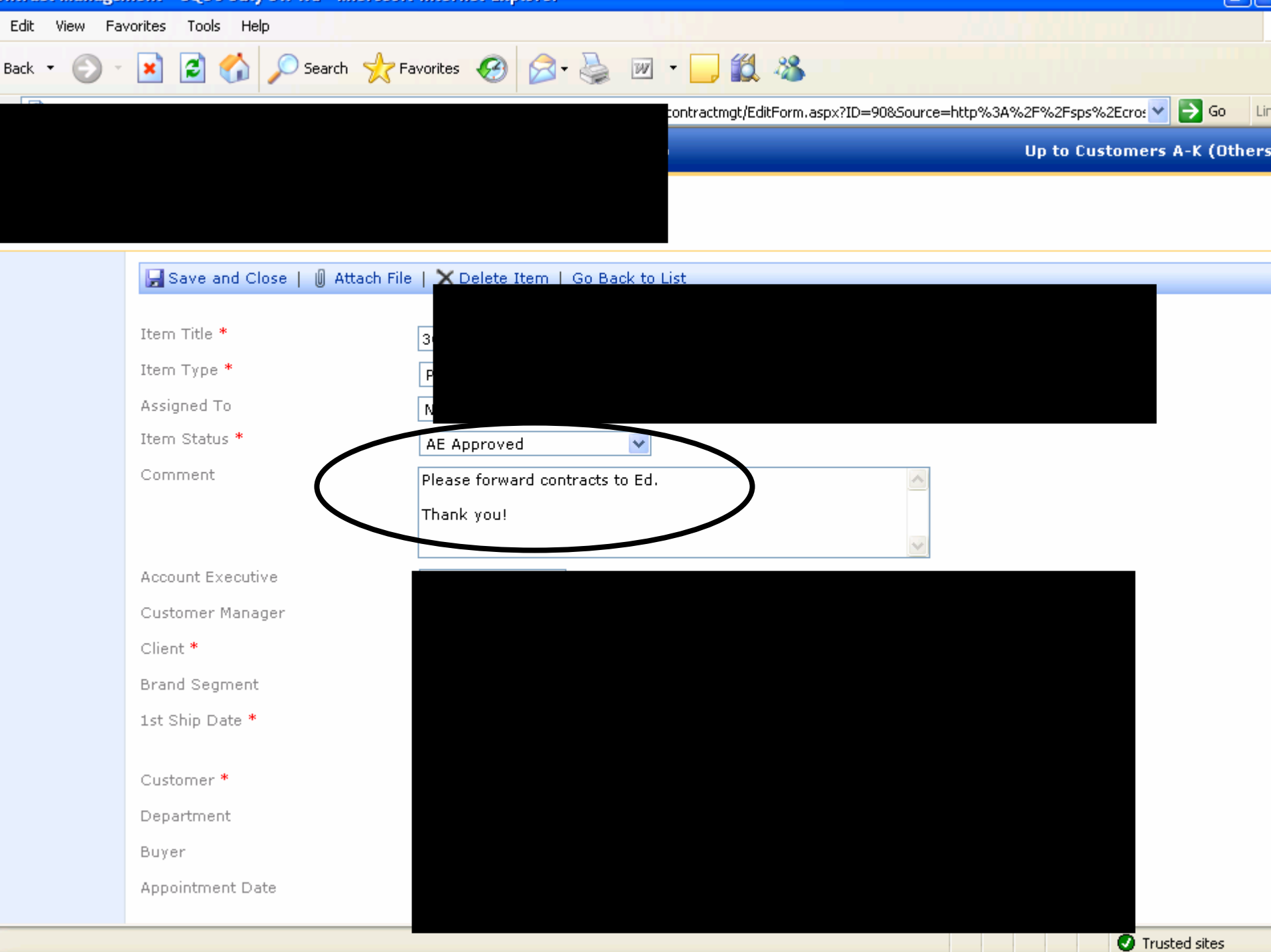
Proposed

- Proposed
- Pending Corrections - AE
- AE Approved
- Pending Corrections -
- CM Presenting
- Customer Accepted
- Customer Rejected

Dan Brody

Customer Might Request Change





Save and Close | Attach File | Delete Item | Go Back to List

Item Title \*

Item Type \*

Assigned To

Item Status \*

Comment

AE Approved

Please forward contracts to Ed.  
Thank you!

Account Executive

Customer Manager

Client \*

Brand Segment

1st Ship Date \*

Customer \*

Department

Buyer

Appointment Date



# Contract Management: 3Q06 July SW Ad

Save and Close | Attach File | Delete Item | Go Back to List

- Item Title \*
- Item Type \*
- Assigned To
- Item Status \*
- Comment
- Account Executive
- Customer Manager
- Client \*
- Brand Segment
- 1st Ship Date \*
- Customer \*
- Department
- Buyer
- Appointment Date

3Q

Pr

Nic

Customer Accepted

- Proposed
- Pending Corrections -
- AE Approved
- Pending Corrections -
- CM Presenting
- Customer Accepted**
- Customer Rejected

Dan Brody

Customer Accepts, Deal is Closed



Enter date in M/D/YYYY format



New York Home

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**MSNBC Business News**

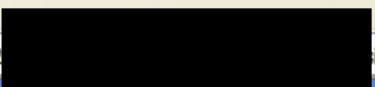
- Stocks recover from Tuesday's sharp sell-off
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  - Customer
    - Pa
    - Ri
  - Customer
    - W
    - W
    - W

**Links**

- C
- M
- C
- C
- C



### Retail Service Requests: New Item

! Items on this list require content approval. Your submission will not appear in public views until approved by someone with proper rights. [More information on content approval.](#)

Save and Close | Attach File | Go Back to List

Project Title \*

Project Description \*  TITLE " [ONE OR TWO WORD PROJECT DESCRIPTION]

Request Date  7/2

Requesting Division \*

Assigned To \*  Abb

Client \*

Brand

Retailer \*

Requested Start Date \*



Generally, projects should have a Monday start date and be requested at least 21 calendar working



days  
PROJ

Target Completion Date \*

Target  
days

Store List \*  C  
 M  
IN  
 C  
 S

Billable \*

If Billable - Hourly Rate

Project Description & Expectations \*

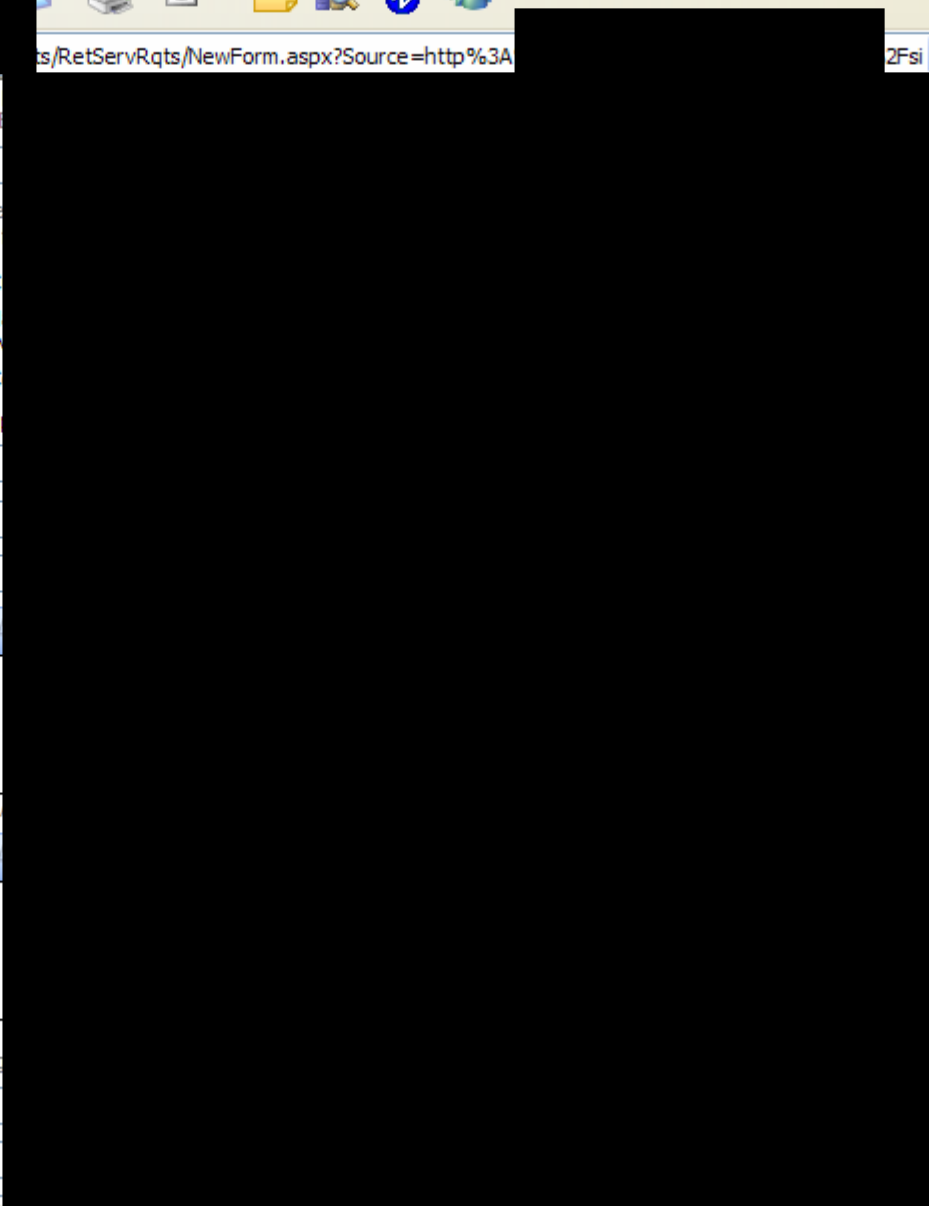
Additional Project Expenses \*

(N/A,  
chang

Number of Stores

Additional Project Expenses Reimbursable \*

Minutes to Complete (Per Store) \*



), FOR LARGE

h 30 calendar

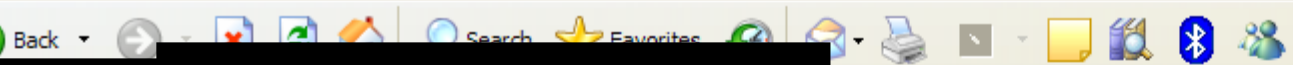
T. PLEASE

(s))

rack shipping,







ork Metro-Mid-Atlantic Division

# Retail Service Requests

- Select a View
- Issues
- Active Issues
- Approve/reject items
- My submissions
- Alert me
- Export to spreadsheet
- Modify settings and columns

Show in Standard View | Task Pane | Totals | Refresh Data

	Issue ID	Project Description	Assigned To	Client	Requesting Division
85	INSTALL				
97	Stock Sta				
99	Egg Crea				
100	distributi				

This view is read-only.

Read-only

# Retail Service Requests

Select a View

Issues

Issues

Active Issues

Approve/reject items

My submissions

Options

Add to My Links

View reports

Alert me

Export to spreadsheet

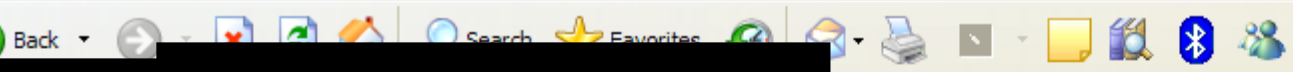
Modify settings and columns

Show in Standard View | Task Pane | Totals | Refresh Data

	Brand	Retailer	Requested Start Date	Start Month	Target Completion Date
E	[Redacted]				
E	[Redacted]				
T	[Redacted]				

This view is read-only.

Read-only



rk Metro-Mid-Atlantic Division

# Retail Service Requests

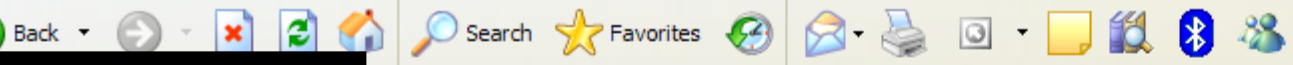
- Select a View
- Issues
- Issues
- Active Issues
- Approve/reject items
- My submissions
- Alerts
- Add to My Links
- View reports
- Alert me
- Export to spreadsheet
- Modify settings and columns

Show in Standard View | Task Pane | Totals | Refresh Data

Store List	Billable	If Billable - Hourly Rate	Project Description & Expectation	Created
[Redacted Content]				

This view is read-only.

Read-only



es/SalesTeam/westernregion/default.aspx

Documents and Lists Create Site Settings Help

Region



Home

**Documents**

- Shared Documents
- Schematic Assistant
- Retail Capacity Planning
- Retail Billing
- Retail Execution Reports

**Pictures**

**Lists**

- Retail Service Requests
- Western Region Client Contacts

**Tasks**

**Discussions**

- General Discussion

**Surveys**

**Announcements**

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June  
John  
Joan  
Don  
by Sr  
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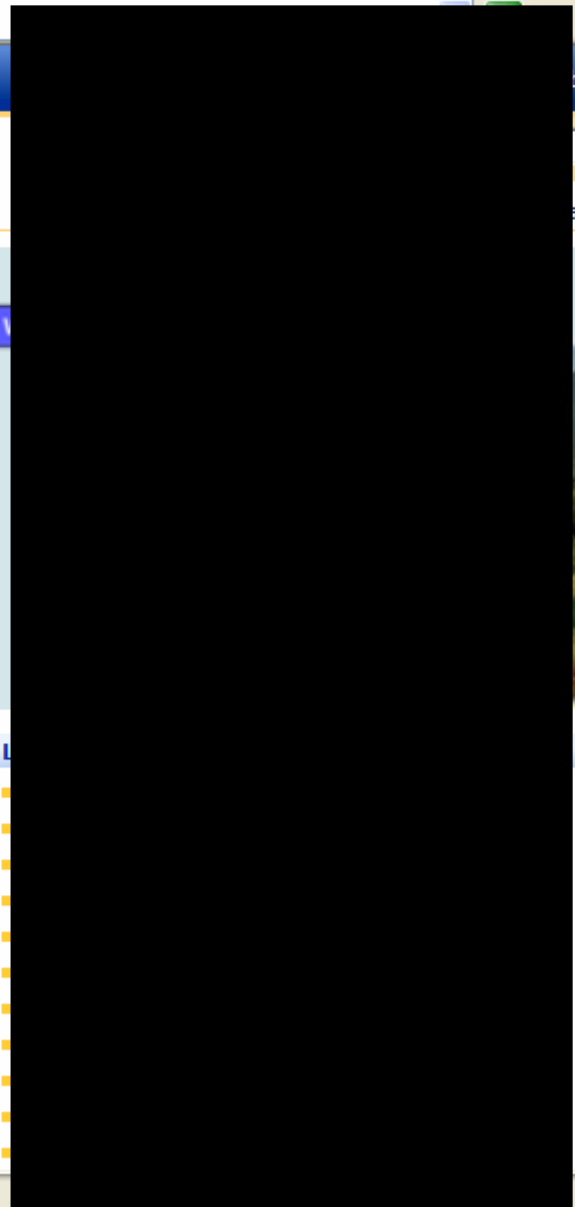
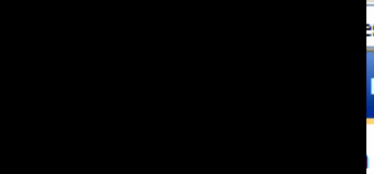
Additional Retail Services Management at the Region Level

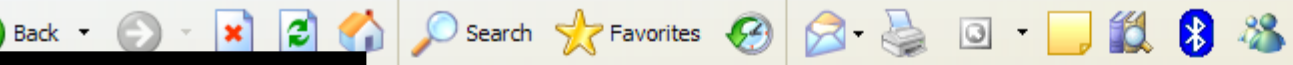
**Even**

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Documents

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- Pricing Reports
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Pictures

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- Division Events Calendar

Discussions

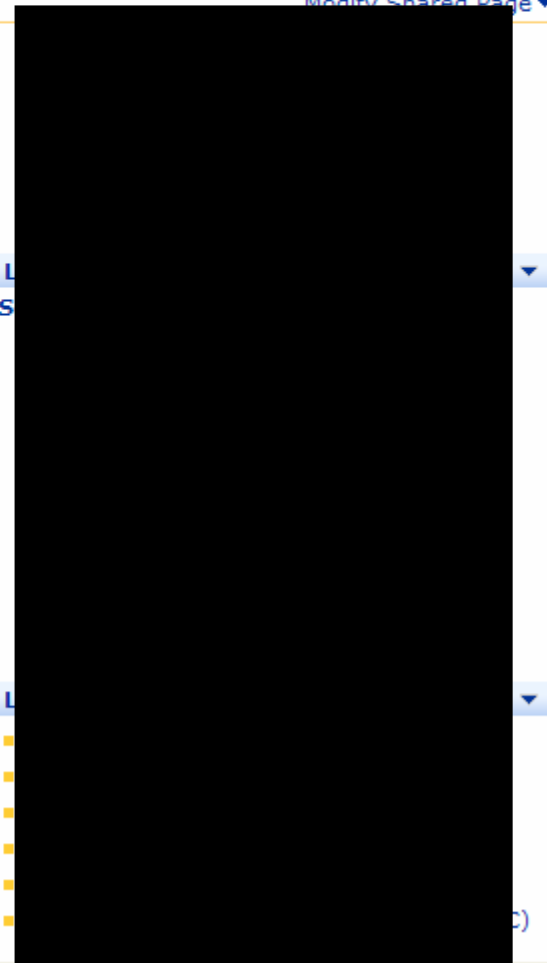
- General Discussion

Surveys

Announcements

Sy	<b>Additional Items Managed:</b>	PM
by		
Sa	Deductions Logs, Proof of	ble
in	How Money Was Spent	
HC		AM
by		
Att	Price Surveys / Reports	PM
HC		
by	Contact Lists	
Pl		PM
Le		
do	Price List Updates	
Th		
SC		PM
by		
Yo	New Item, Speed to Shelf Reports	AM
Wi		
by		
We	Retailer Add/Drop Product Lists	
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A/R Logs



# Sales Call Management and Reporting

## Contracts Management

- Select a View
- Issues
- Issues
- View By Month
- View By Client
- View By Department
- View By Type
- View By Status
- View By Assignment
- View by Customer
- View By Assignment
- View By Client
- View By Customer
- View By Buyer
- Options
- Add to My Links
- View reports

New Row | Show in Standard View | Task Pane | Totals | Refresh Data

Buyer	Appointment Date	Retailer Status	Retailer Commitments / Commer	Actual Performance
TA [Redacted]	/2006	Accepted As Is	Tami app... willingness... product th... stores.	sale for 2 weeks
NI [Redacted]	/2006			
GA [Redacted]		Accepted As Is		
GA [Redacted]		Accepted As Is		
GA [Redacted]		Accepted As Is		
GA [Redacted]		Accepted As Is		
GA [Redacted]		Accepted As Is		
GA [Redacted]		Accepted As Is		

For assistance with Datasheet view, see Help.

