

# **UNILEVER NIGERIA PLC CUSTOMER DEVELOPMENT**



## **LEVEREDGE DOCUMENTATION & GUIDELINES**

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## Contents

1.1	ABOUT THIS GUIDE.....	9
2.1	LOGGING ON TO THE SYSTEM .....	10
3.1	SETTING UP PARAMETERS .....	11
3.2	SETUP: SECONDARY ENTITIES.....	11
	Localities .....	11
	Sub Localities .....	12
4.1	UNIVERSE INTEGRITY: OUTLET SETUP .....	13
	Adding A New Outlet (POP) .....	13
	POP creation process Flow.....	13
	Creating an outlet using the Mobility device.....	13
	Creating an outlet on OSDP (Back office) .....	14
4.2	UNIVERSE INTEGRITY: POP APPROVAL .....	15
	Section POP Permanent .....	15
4.3	UNIVERSE INTEGRITY: DEACTIVATING AN OUTLET .....	16
	Deactivation Procedures.....	16
4.4	UNIVERSE INTEGRITY: MIGRATING AN OUTLET .....	16
	PJP to PJP migration.....	16
	KD to KD migration.....	16
	Updating an existing Outlet (POP) .....	17
4.5	UNIVERSE INTEGRITY: OUTLET GEOCODING.....	17
	Geo-capturing process .....	17
	Checking Geocode match Status .....	18
	Geo-Retagging process .....	18
	Geo-Coding Error Message .....	19
4.6	UNIVERSE INTEGRITY: OUTLET CHANNEL CHANGE.....	20
	Why Channel Change? .....	20
	Important to Note: Processes for Channel Change .....	20
	POP Utilities .....	20
	Important to Note: POP Indexing processes.....	21
	Important to Note: POP Tracking .....	21
5.1	SETUPS: DSRs .....	22
	Processes for DSR Creation.....	22
5.2	SETUPS: PJP .....	23
	PJP Creation .....	23
	Vehicle .....	23
	Section .....	24

Section POP Permanent .....	24
PJP .....	24
Create New PJP .....	24
Route One Week .....	25
PJP Cycle .....	26
PJP by Cycle .....	26
PJP Status Change .....	26
PJP Dead/Alive .....	26
6.1 TRANSACTION: STOCK RECEIPT .....	27
Manual Entry .....	27
Edit .....	28
View List .....	28
In Transit List .....	28
6.2 TRANSACTION: CASH MEMO .....	29
Counter Sales .....	29
Edit List .....	29
View List .....	29
Status Change .....	29
Status Change PJP .....	30
Cancel List .....	30
6.3 TRANSACTION: PICK LIST .....	30
Auto-GIN .....	30
Manual GIN .....	30
Edit Manual GIN .....	30
View Manual GIN .....	30
Delete Manual GIN .....	30
Rules to making GIN (OB & DM) .....	30
6.4 TRANSACTION: UTILITIES .....	31
Apply Schemes on Full PJP .....	31
Delivery Date Change .....	31
6.5 TRANSACTION: SALES RETURN .....	31
Entry .....	31
View List .....	32
Entry W/O CM .....	32

6.6	TRANSACTION: STOCK RETURN .....	32
	GRN: .....	32
	Edit List.....	32
	Delete List .....	32
	View List.....	32
	Manual GRN .....	32
	Important to Note: Sales Transaction Data Check.....	33
6.7	TRANSACTION: RECEIPTS.....	33
	Deposit Slip .....	33
	Credit Debit Note Entry.....	33
	View List .....	33
6.8	TRANSACTION: ADJUSTMENT .....	33
	SAN Entry .....	34
	Important to Note: Process for SAN.....	34
6.9	TRANSACTION: PHYSICAL STOCK.....	34
	Download Physical Stock Sheet.....	34
	Upload Filled Physical Stock Sheet .....	35
	Stock View All .....	35
	Stock Reconcile .....	35
	Important to Note: Physical & System stock reconciliation .....	35
6.10	TRANSACTION: TRANSFER INVOICE (Return Advice) .....	36
	Entry .....	36
	Edit List .....	36
	View List.....	36
	Important to Note: Processes for Return Advice (RA).....	36
7.1	PROCESS.....	37
7.2	PROCESS: DAILY CLOSING.....	37
	Day End Process.....	37
	Generate Backup .....	37
	Day End Process - PJP.....	37
	FCS DSR Process.....	37
	EFOS Process.....	37
	Important to Note: Guidelines for all FCS, iQ & EFOS Processes.....	38
8.1	OTHERS: SECURITY.....	39
	Designation .....	39
	User Rights .....	39

Users .....	39
User Profile Definitions .....	40
Important to Note – Users (Unilever Employees) .....	40
Important to Note: Users (KD employees) .....	41
Change Password .....	41
Important to Note: Password Management.....	42
User Scheme Builder .....	42
Menu Re Arrange .....	42
8.2 OTHERS: AUDIT MENU .....	42
Last Sync View .....	42
Update Log.....	42
Day End Log.....	43
Update Log Consolidate .....	43
Scheme Log .....	43
8.3 OTHERS: SYSTEM GENERAL AUDIT .....	43
Guidelines for LeverEDGE General audit .....	43
9.1 STRUCTURE: LEVEREDGE TEAM.....	44
9.2 ISSUE LOGGING PROCESS.....	44
Guidelines for Issue Resolution.....	44
Service Levels Agreement (SLA) defined according to issues priority .....	44
Definition of Incident Types.....	45
10.1 REPORTS .....	46
List of commonly used reports.....	46
Sales Reports .....	46
Coverage Reports.....	46
FCS Reports.....	46
iQ Reports.....	47
Assortment Reports .....	47
eFOS Reports .....	48
Important to Note: Guidelines for Reports.....	48

## Terminologies used in the document

Abbreviation	Meaning
SOP	Standard Operating Practice
SNDPro	Sales & Distribution Professional (This is interchangeably used with LeverEDGE system)
OSDP	Offline SND Pro
CSDP	Central SND Pro
POP	Point of Purchase (This is interchangeably used with outlet or store)
KD	Key Distributor
DSR	Distributor Sales Representative
DTO	Distributive Trade Operator
FSM	Field Sales Manager
ASM	Area Sales Manager
RSM	Regional Sales Manager



# 1.1 ABOUT THIS GUIDE

## Introduction

This SOP Document is only for activities within the LeverEDGE space (Technical and Operational). The document is developed to help implement, Monitor and administer more effective and efficient guidelines around our Distributor Management System (SNDPro), provide feasible approaches that govern the operations of SNDPro. It also provides information on the functional capabilities provided by the LeverEDGE application (SNDPro) and how to use these capabilities in the most effective manner to achieve the desired results. We expect that all Users and operators of the system will acquaint themselves with these procedures and follow them as agreed herein.

## When to update the Document

Modifications to the document will be issued with accompanying instructions to add, remove or replace the updated material. For information regarding upcoming updates, please contact the LeverEDGE Team.

## Graphical Conventions

For convenience, the below icons have been used in this manual:

 - To indicate information of particular interest and attention to the users.

## Conventions

Certain typographical conventions are used in this manual to make clear the meaning and usage of various commands, statements, programs, examples, etc. This section provides a summary of these conventions.

[This Type Style]	Indicates a push button on the graphical user interface. Examples are [Modify], [Add], [Save] etc.
This >> type >> style	Indicates the complete path to the respective section

## 2.1 LOGGING ON TO THE SYSTEM

To access S&D Pro, type the following link in the address bar of your browser: [http:// \[Server Name\]/ \[Instance Name\]](http://[Server Name]/[Instance Name])

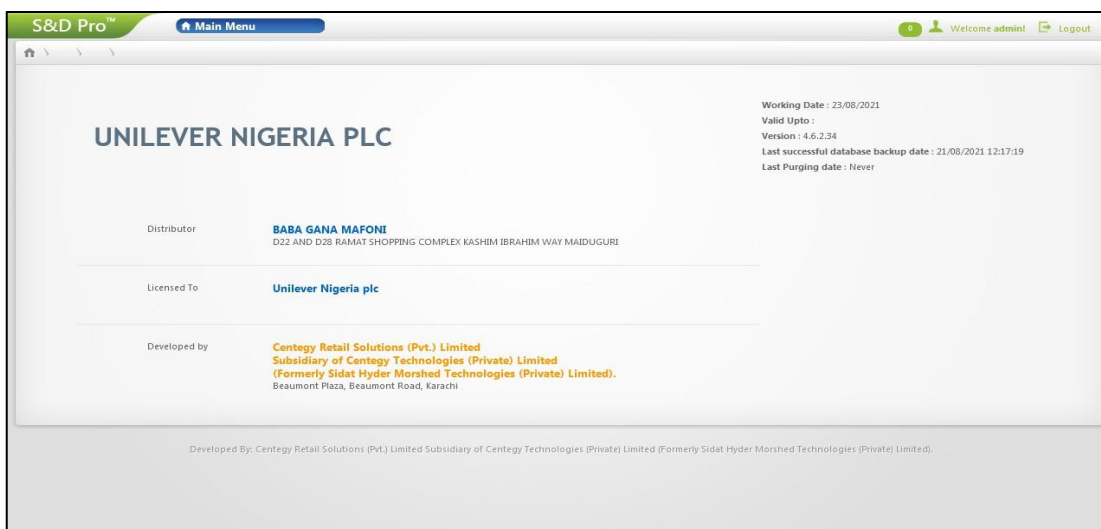
Press Enter to proceed to the Log In page of S&D Pro System.



You need to enter a valid Distributor ID, User ID and Password in order to login to the system. Insert the authorized Distributor Code, user Identification and password respectively and click **[Sign In]** button to continue.

 **For your convenience, size and resolution of the display can be adjusted by 'Display Settings' in the control panel.**

The system will accept and verify the username and password, determine user's role & privileges in the system, check validity of software and password policy and directs the user to the main page of application.



*Passwords are case-sensitive. Be sure to use the right case when entering the password.*

 **By entering a wrong password, the system will display an Error Message window prompting the user to enter the correct password at the application's Login Page.**

## 3.1 SETTING UP PARAMETERS


### Types of parameters

There are 2 types of parameters, i.e. company level and local/distributor level. Company level parameters are set at the central level (CSDP) and flow down to DT level while the distributor level parameters are configured at OSDP level only and flow back to CSDP level as required.

### What Are the Entities for which Parameters can be Set?

There are different entities for which user can set up the parameters as per company's requirements:

- Primary Entities
  - Distributors
  - Channels
  - Product
  - Price Structure
  - Batch
  - Banks
  - Tax
- Secondary Entities
  - Point of Purchase (POP)
  - Distributor Sales Representative (DSR)
  - Permanent Journey Plan (PJP)
  - Section

 **Primary Entities are setup at the point of data base and system configuration. This is a one-off exercise which is not repeated and is carried out by the system developers working with the LeverEDGE Lead who also serves as the system Lead Administrator.**

**We will look at the Secondary Entities as it relates to our operations for LeverEDGE in Nigeria.**

## 3.2 SETUP: SECONDARY ENTITIES

If a new outlet, DSR, PJP, section or POP section is added by a distributor, it becomes a part of the system. Added outlets, DSRs, PJPs, sections or POP sections helps the user of the system, and the operators integrate with the daily transactions. Without these entities, the transactions captured on the system do not have traceable point.

### Localities

Locality is a physical location, which is a child part of the town. It is further divided into sub localities, but the details about the locality can be added through this section. Follow the path below to add details regarding locality of a POP: **Main Menu >> Setups >> Outlet >> Locality**

Title	Description
Town	Name of town where this locality belongs
Code	Identification of locality
Short Description	Short identifier of locality
Long Description	Long identifier of locality

### **Adding a Locality** - To add a new Locality

1. Go to Locality setup
2. Fill in the required fields
3. Click **[Save]** button
4. Wait while the data is being processed
5. List will be updated with a new locality

### **Modifying a Locality** - To modify an already existing locality:

1. Go to Locality setup
2. Select an already existing locality you need to modify
3. Click **[Modify]** button
4. Wait while the data is being processed
5. The system will acknowledge user for the successful modification of locality

### **Sub Localities**

The geographical locations are further divided into different sub locations to keep the tracking process easier for the user. All Localities that are added in the system are divided into sub localities. Follow the path to add details regarding the sub localities of a POP: **Main Menu >> Setups >> Outlet >> Sub Locality**

The following information should be provided to define sub locality:

Title	Description
<b>Town</b>	Name of town where sub locality Exists
<b>Locality</b>	Name of locality where sub locality Exists
<b>Code</b>	Identification code of sub locality
<b>LSM</b>	Lifestyle management (Urban, Rural, etc)
<b>Short Description</b>	Short identifier of sub locality
<b>Long Description</b>	Long identifier of sub locality

## 4.1 UNIVERSE INTEGRITY: OUTLET SETUP

Outlet or POP (Point of purchase) can be defined as the sales outlets that serve as the points of purchasing for the consumers. This section enables the user to define the parameters regarding the point of purchase; different types of parameters are to be set for describing the POP(s) or sales outlets in the system. Following types of parameters are setup to define POP(s). Pathway: **Main menu >> Universe Integrity**

 **All outlets created in LeverEDGE go through an approval process to make sure it is legit and authorized.**

### Adding A New Outlet (POP)

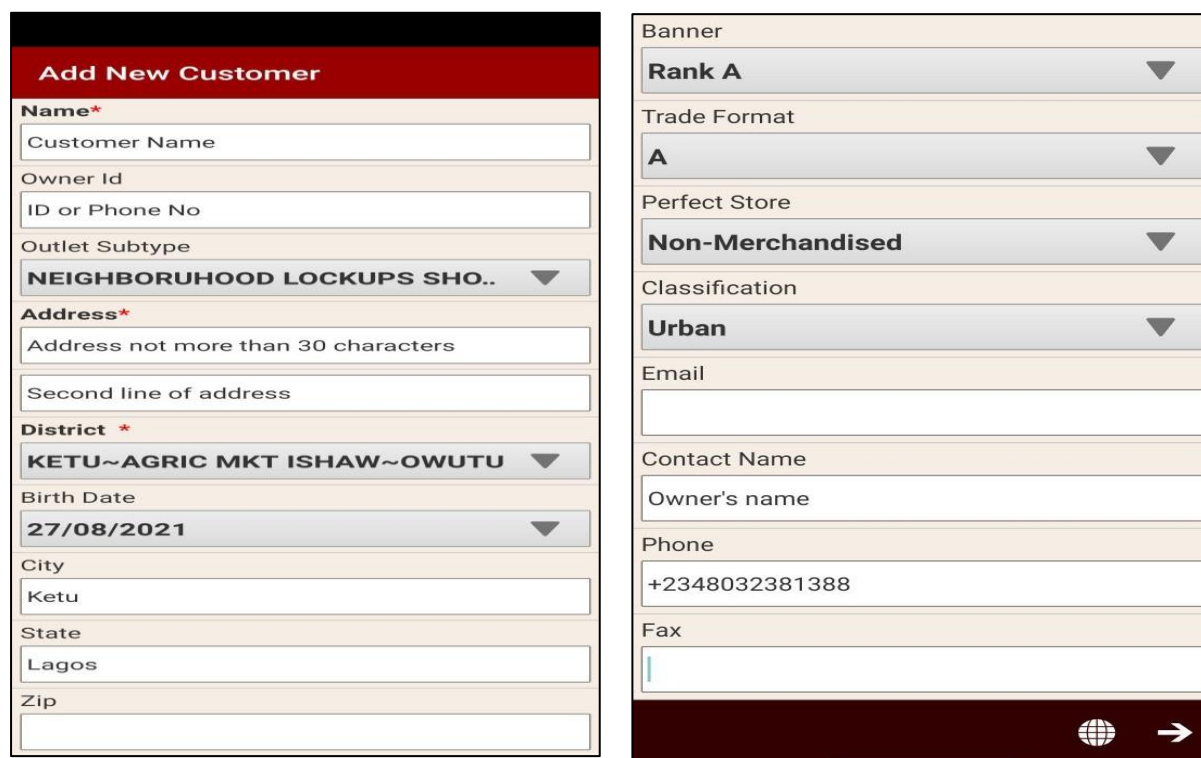
This section is used to enter a new outlet into the system for the transaction and processes of the daily sales.

**Note: The Mobility device is the only approved means for DSRs to use for POP creation. To enter a POP via the Backoffice, approval must be given by the FSM, who in writing must been gotten approval by the LeverEDGE Lead.**

### POP creation process Flow

- DSR identifies a new outlet and gets all relevant information about the outlet.
- DSR creates the outlet using his/her Mobility.
- Outlet flows to CSDP for FSM/ASM approval. (Approval can be done by ASM if there is no FSM managing the KD)
- FSM/ASM will approve or reject the outlet at CSDP after proper checks for the new outlet created.
- Once approved at CSDP, DTO will be informed to execute QS and download POPs to OSDP.
- A notification will be displayed on the application home screen for the new outlets.
- At OSDP, user will associate the newly created outlet(s) to relevant sections for further process.

### Creating an outlet using the Mobility device



The Mobility screen shows the details that need to be added by the DSR when creating an outlet.

 **All the items with asterisks (\*) are compulsory details without which the outlet creation cannot be complete.**

## Creating an outlet on OSDP (Back office)

As soon as an outlet is entered in the system by the user through this option, a request of new outlet is sent to the centralized location for approval being done by relevant company authorities.

To view this section, follow the path: **Main Menu >> Universe Integrity >> Setup >> POP**

The screenshot shows the 'UI Outlet Setup' window in S&D Pro. At the top, there's a 'View Mode' section with filters for Town (KAB. LOMBOK UTARA), Locality (BAYAN), and Sub Locality (MUMBUL SARI). Below this is a table of POPs with columns: POP, POP Name, POP Type, Sub Element, Market Name, Action, POP Class, Rank, Approval Status, and Remarks. The table lists four POPs, with the last one in 'Approval in Progress' status. At the bottom left is an 'Add' button.

POP	POP Name	POP Type	Sub Element	Market Name	Action	POP Class	Rank	Approval Status	Remarks
00070523	smartland	BIG	C1085B - INSTITUTION		Active	A	A	Finalized	
00070522	MT Test-Outlet	BIG	C1085B - INSTITUTION		Active	A	A	Finalized	Merch ADM Approval
00050899	Merch Outlet 2	MING	C1085B - INSTITUTION		Active	A	A	Finalized	Merch ADM approve
00050898	Merch test outlet	MING	C1085B - INSTITUTION	stkt	Active	A	A	Approval in Progress On CO TSM (CSDM)	

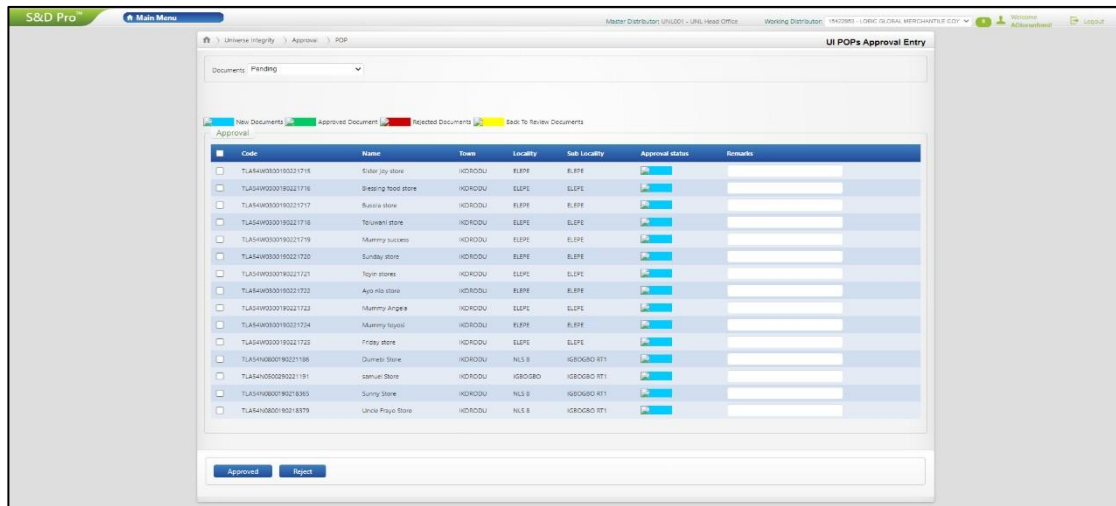
On clicking the **[Add]** button, user will be directed to the following page:

The screenshot shows the 'Entry' screen for creating a new POP. It has a top navigation bar with 'View', 'Edit', 'Contact', 'UnBranded Product', 'Branded Product', 'Tax Setup', 'Credit Setup', 'Account', 'Profit Center Setup', 'Bank', 'IC Attribute', and 'Survey'. The main form is divided into two columns. The left column contains fields for Town, Locality, Sub Locality, POP Name, Area Type, Market Name, Street/Road, Police Station, Tehsil, Post Code, Fax, E-mail, Turnover, Total Turnover, Credit Days, Freezer, Identified By, Sub Distributor, Short POP Name, Scan POP Barcode, Restrict Un-Mapped Bank, Perfect Store, and Distributor District. The right column contains fields for POP Code, Outlet Banner, POP Type, Counter Sales, Phone, Shop Number, Active/Inactive, POP Class, Overall Rank, Credit Amount, Cool Cabin, Identified On, Owner Name, Owner NIC, District, Previous Town, Previous POP Code, Tax Exemption, Bar Code, Auto Tax Invoice, Perfect Store Creation Date, Corporate Customer, and Bill-To Customer. At the bottom are buttons for 'Add', 'Save', 'Update', and 'Delete'.

User can perform Add, Delete and Modify operations.

## 4.2 UNIVERSE INTEGRITY: POP APPROVAL

After the outlet has been added to the system, a request for approval is sent to the FSM or ASM of the KD via email by the DTO/KDM. To view this section, follow the path: **Main Menu >> Universe Integrity >>Approval>>POP**

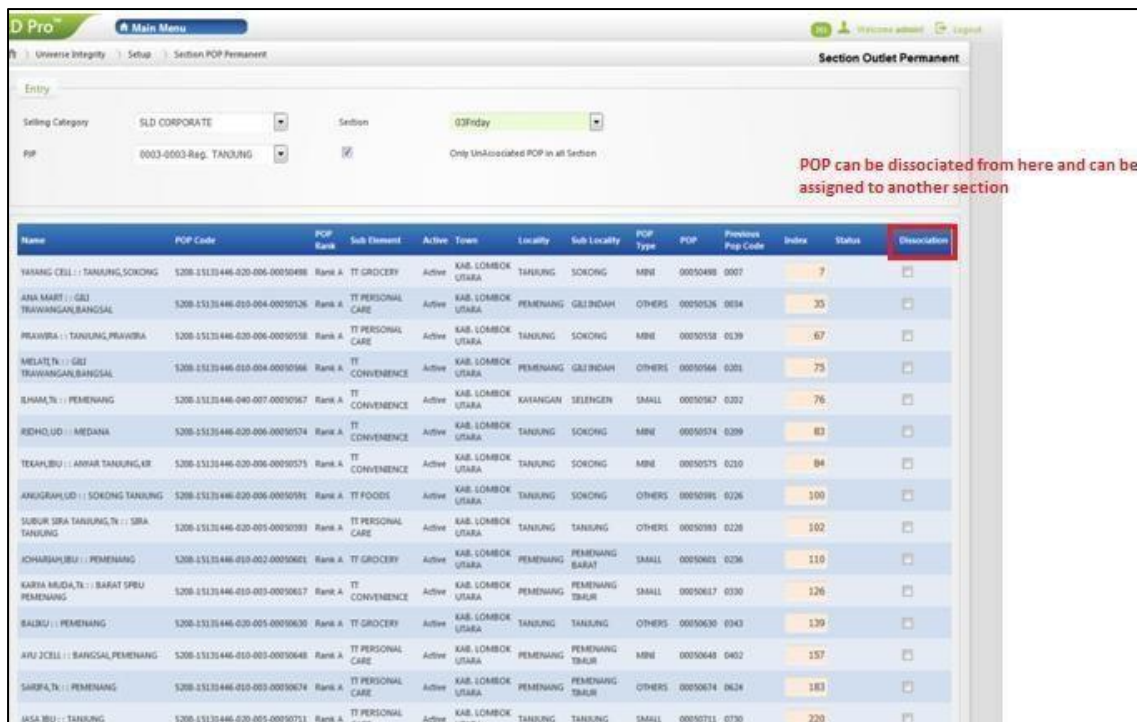


### Section POP Permanent

After POP approval, the POP can then be sectioned into a particular section created for a PJP. Section is a group of POP to be visited by DSR in a day. User can permanently assign POP for a particular section. The POP that is defined with respect to any selected DSR will be considered as permanent route outlet where the products of different categories are to be delivered.

 **Outlets are added in section at OSDP whereas its approval is done from CSDP.**

Follow the path to view this section: **Universe Integrity >>Setup >>Section POP Permanent**






## 4.3 UNIVERSE INTEGRITY: DEACTIVATING AN OUTLET

If there is need to make an Active outlet Inactive, this will have to be done based on the context. However, there are certain criteria that need to be met this is done. The criteria include

- a. Outlet must not be physically active.
- b. Outlet must not have sales on the system after the request for deactivation is made.

 **These criteria are to be reviewed by the FSM/ASM and the LeverEDGE support in the region before a request for deactivation is put forward.**

### Deactivation Procedures


- DSR identifies an inactive outlet in his/her route and informs FSM/ASM.
- FSM/ASM & LeverEDGE support in the region ensures all system and physical checks are done.
- FSM/ASM sends an email for Deactivation to the LeverEDGE Lead.
- Deactivation form is sent to the FSM to complete and get all necessary sign-offs.
- Once signoffs are completed, outlets are deactivated on the LeverEDGE system.

## 4.4 UNIVERSE INTEGRITY: MIGRATING AN OUTLET

Migration refers to moving an outlet either from one PJP to another or from one KD to another. This is done if the outlet has either changed location due to relocation/demolition (One PJP to another) or the territory has been ceded to another KD (One KD to another).

### PJP to PJP migration

- DSR identifies an outlet in his/her route that has changed location within the KD's territory.
- FSM/ASM is informed to checks for validity.
- FSM/ASM writes to the LeverEDGE support to move the outlet from the previous PJP to the new PJP.
- Approval by the LeverEDGE Lead is optional here as the POP already exists in the KD's territory.
- LeverEDGE support completes the movement of the POP from existing PJP to new PJP

 **If the POP belongs to the same PJP but in different route, movement is also done from one Section to another. Also, movement of POP cannot be done if the POP to be moved already has sales for that particular day.**

### KD to KD migration

- FSM/ASM identifies outlet(s) to be moved to the new KD.
- RSM's approval is gotten to effect movement.
- FSM/ASM writes to the LeverEDGE support to move the outlet(s) from the existing KD to the new KD.
- Approval given by the LeverEDGE Lead and Migration form is sent to the ASM to complete and get all necessary signoffs.
- Once signoffs are completed, outlets are migrated from existing KD to new KD.
- Outlets are also deactivated on the existing KD's LeverEDGE system.

 **Deactivation of the outlets will follow the criteria for Outlet Deactivation in above.**



## Updating an existing Outlet (POP)

Details of existing outlets like Name, address, phone number and other details can be updated on the LeverEDGE system in cases where the need arise. However, these changes must be communicated to the LeverEDGE support in the region who in-turn communicates to the Local Information & Analytics Team to enable proper data sync into U2K2 SAP as the system could see new details as a foreign data.

## 4.5 UNIVERSE INTEGRITY: OUTLET GEOCODING

Geocode is defined as the location identifier of the outlets. The coordinates are gotten from the general geocoordinates system. Latitudes and Longitudes make up the coordinates.

### Geo-capturing process

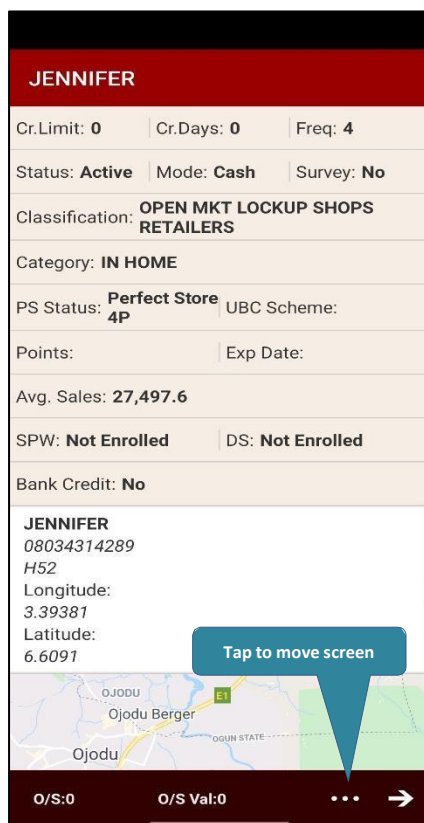
After the outlet entry processes have been completed, the DSR is expected to Geo-tag the outlet. The following rules apply for new outlet Geo-tagging

- Tagging must be done in the outlet.
- GPS must be enabled on the DSR's Mobility (or HHT).
- DSR must open the order taking screen for the first time only when the salesman is within 50 meters radius range from the outlet.

 If the screen is opened outside the 50 meters radius range, it will result in Geo Mismatch during the next visit

Pathway to capturing Geo-code is as shown below

Login >> Landing Page >> Main Menu >> Round >> Customer Selection >> Customer Profile >> Order taking menu



**JENNIFER**

Cr.Limit: 0 | Cr.Days: 0 | Freq: 4

Status: Active | Mode: Cash | Survey: No

Classification: OPEN MKT LOCKUP SHOPS RETAILERS

Category: IN HOME

PS Status: Perfect Store 4P | UBC Scheme:

Points: | Exp Date:

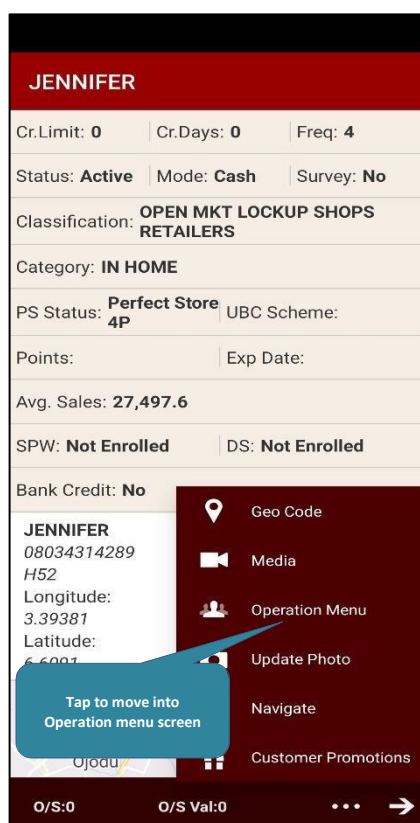
Avg. Sales: 27,497.6

SPW: Not Enrolled | DS: Not Enrolled

Bank Credit: No

**JENNIFER**  
08034314289  
H52  
Longitude:  
3.39381  
Latitude:  
6.6091

Tap to move screen



**JENNIFER**

Cr.Limit: 0 | Cr.Days: 0 | Freq: 4

Status: Active | Mode: Cash | Survey: No

Classification: OPEN MKT LOCKUP SHOPS RETAILERS

Category: IN HOME

PS Status: Perfect Store 4P | UBC Scheme:

Points: | Exp Date:

Avg. Sales: 27,497.6

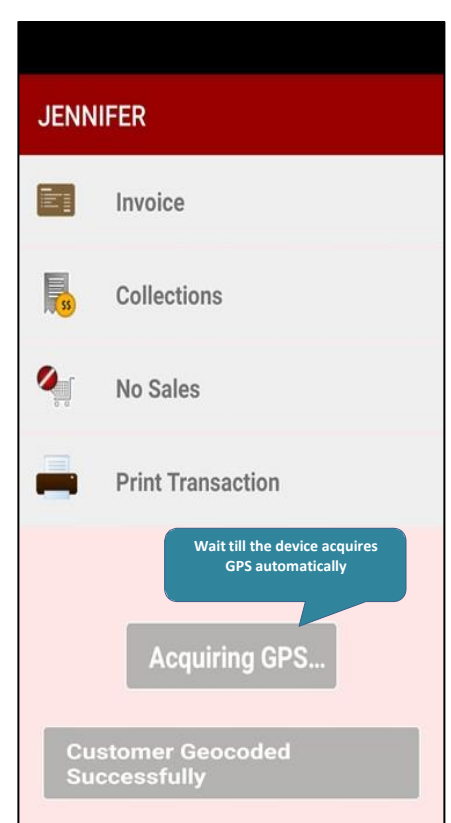
SPW: Not Enrolled | DS: Not Enrolled

Bank Credit: No

**JENNIFER**  
08034314289  
H52  
Longitude:  
3.39381  
Latitude:  
6.6091

Geo Code  
Media  
Operation Menu  
Update Photo  
Navigate  
Customer Promotions

Tap to move into Operation menu screen



**JENNIFER**

Invoice

Collections

No Sales

Print Transaction

Wait till the device acquires GPS automatically

Acquiring GPS...

Customer Geocoded Successfully

## Checking Geocode match Status

After the Geo code capture, the DSR needs to go back to the order screen to confirm the Geo code match status.

Pathway to confirming Geo-code match status is as shown below

Login >> Landing Page >> Main Menu >> Round >> Customer Selection >> Customer Profile >> Order taking menu

Customer Selection			Customer Selection			Customer Selection		
Master_Channel	Sub_Element	ALL	Master_Channel	Sub_Element	ALL	Master_Channel	Sub_Element	ALL
(ALL)	(ALL)		(ALL)	(ALL)		(ALL)	(ALL)	
Code/Name	District		Code/Name	District		Code/Name	District	
TLA52~001~001~900 55828 Mrs Aderemi ()	Geo Code Match		TLA52~001~001~900 55828 Mrs Aderemi ()	Geo Code Mis-Match		TLA52~001~001~900 55828 Mrs Aderemi ()	Not Visited or No master Geo Code	
TLA52~TSR~001~000 00769 THE KINGS STORE ()			TLA52~TSR~001~000 00769 THE KINGS STORE ()			TLA52~TSR~001~000 00769 THE KINGS STORE ()		
TLA52~001~001~900 56802 Mumy Segun store ()	1 Dayo akinyemi street		TLA52~001~001~900 56802 Mumy Segun store ()	1 Dayo akinyemi street		TLA52~001~001~900 56802 Mumy Segun store ()	1 Aderemo street Agric	
TLA52~001~001~900 55831 Mrs Ayewunmi ()	6 Aderemi street		TLA52~001~001~900 55831 Mrs Ayewunmi ()	6 Aderemi street		TLA52~001~001~900 55831 Mrs Ayewunmi ()	6 Aderemi street	
TLA52~001~001~900 56800 suntex store ()	2 Banjo street Agric		TLA52~001~001~900 56800 suntex store ()	2 Banjo street Agric		TLA52~001~001~900 56800 suntex store ()	2 Banjo street Agric	
TLA52~001~001~900 56801 Gods time store ()	25 Ikeenne street Agric		TLA52~001~001~900 56801 Gods time store ()	25 Ikeenne street Agric		TLA52~001~001~900 56801 Gods time store ()	25 Ikeenne street Agric	
TLA52~001~001~900 56803 Tunmise frozen foods ()	1b Dayo Akinyemi street		TLA52~001~001~900 56803 Tunmise frozen foods ()	1b Dayo Akinyemi street		TLA52~001~001~900 56803 Tunmise frozen foods ()	1b Dayo Akinyemi street	
TLA52~001~001~900 56807 Aremo store ()	7 Segun Isola street		TLA52~001~001~900 56807 Aremo store ()	7 Segun Isola street		TLA52~001~001~900 56807 Aremo store ()	7 Segun Isola street	
TLA52~001~001~900 56808 Mum Samuel store ()	6 Dayo Akinyemi street		TLA52~001~001~900 56808 Mum Samuel store ()	6 Dayo Akinyemi street		TLA52~001~001~900 56808 Mum Samuel store ()	6 Dayo Akinyemi street	
TLA52~001~001~900 56798 Mum Samuel store ()	19 Dayo Akinyemi street		TLA52~001~001~900 56798 Mum Samuel store ()	19 Dayo Akinyemi street		TLA52~001~001~900 56798 Mum Samuel store ()	19 Dayo Akinyemi street	
Total :35	Serviced :2	+	Total :35	Serviced :2	+	Total :35	Serviced :2	+

Geo-tagging is a ONE-TIME exercise and MUST not be repeated as Initial Geo-codes would have been locked on system.

## Geo-Retagging process

This step is only to be done if the Geo-codes of the outlets are not matching despite several visits of the DSRs. However, the below checks will be done by the FSM/ASM and LeverEDGE support to ensure the concern is regarded as valid.

- The Outlet has not matched before since the initial tagging. (Meaning that the DSR didn't follow the rules)
- The outlet has moved from previous location to a new location, but the initial coordinates are still on system.

Once these checks are completed, the following take place

- Geo-code reset request will be made by the FSM/ASM to the LeverEDGE Lead
- Approval for geo-retagging given by the LeverEDGE lead
- Geo-code retag form will be filled by the FSM/ASM and signoff gotten from all relevant stakeholders.

Pathway to capturing Geo-code is as shown below

Login >> Landing Page >> Main Menu >> Round >> Customer Selection >> Customer Profile >> Option >> Geo Code

**JENNIFER**

Cr.Limit: 0 | Cr.Days: 0 | Freq: 4

Status: **Active** | Mode: **Cash** | Survey: **No**

Classification: **OPEN MKT LOCKUP SHOPS RETAILERS**

Category: **IN HOME**

PS Status: **Perfect Store 4P** | UBC Scheme:

Points: | Exp Date:

Avg. Sales: **27,497.6**

SPW: **Not Enrolled** | DS: **Not Enrolled**

Bank Credit: **No**

**JENNIFER**  
08034314289  
H52  
Longitude: 3.39387  
Latitude: 6.6091

Geo Code  
Media  
Operation Menu  
Update Photo  
Navigate  
Customer Promotions

O/S:0 | O/S Val:0

**JENNIFER**

Cr.Limit: 0 | Cr.Days: 0 | Freq: 4

Status: **Active** | Mode: **Cash** | Survey: **No**

Classification: **OPEN MKT LOCKUP SHOPS RETAILERS**

Category: **IN HOME**

PS Status: **Perfect Store 4P** | UBC Scheme:

Points: | Exp Date:

Avg. Sales: | SPW: | DS: | Bank Credit: |

**Prompt**  
Customer has been already Geocoded, Overwrite?

NO YES

**JENNIFER**  
08034314289  
H52  
Longitude: 3.39387  
Latitude: 6.6091

O/S:0 | O/S Val:0

**suntex store**

Cr.Limit: 0 | Cr.Days: 0 | Freq: 4

Status: **Active** | Mode: **Cash** | Survey: **No**

Classification: **OPEN MKT LOCKUP SHOPS RETAILERS**

Category: **IN HOME**

PS Status: **Non-Merchandise** | UBC Scheme:

Points: | Exp Date:

Avg. Sales: | SPW: | DS: | Bank Credit: |

**Current picture will be replaced. Continue?**

CANCEL OK

**suntex store**  
07063444468  
23401  
Agric  
2 Banjo street Agric  
Longitude: 3.27215  
Latitude: 6.66099

**Customer Geocoded Successfully**

O/S:0 | O/S Val:0

## Geo-Coding Error Message

If the GPS Error message is received, it means that the GPS signal are not available at that location. Please retry again, following the same process.

**ร้านย่อย (บ.สุติเมท)**

Cr.Limit: 0 | Cr.Days: 0 | Freq: 5

Status: **Active** | Mode: **Cash** | Survey: **No**

Outlet Type: **IC - Mom & Pop**

Outlet SubType: **IC - M&P STREET/LOCAL**

PS Status: **N/A** | UBC Scheme:

Points: | Exp Date:

Avg. Sales: 0 | SPW: No

**Gps Error**  
GPS timed out/cancelled.

Ok

**ร้านย่อย**  
abc@pg  
00000000  
ร้าน สาขา  
72345  
สาขา  
Longitude:  
0  
Latitude:  
0

O/S:1 | O/S Val:331,980

 **Always remember that Geo-code tagging is just once and after that, the outlet will automatically match whenever the DSR visits and opens the order screen of the outlet.**

## 4.6 UNIVERSE INTEGRITY: OUTLET CHANNEL CHANGE


Channel change involves the process of changing an outlet from one channel classification to another. Outlet Channel change is initiated by the DSR upon visit to the store and confirmation done by FSM/ASM after proper validation.

### Why Channel Change?

- Location change can warrant channel change. (i.e a retailer moving from the Open market to open a shop in the Neighbourhood)
- Status Upgrade (a Neighbourhood grocery upgrading to LMT or an Open market store upgrading to a wholesaler)

### Important to Note: Processes for Channel Change

- DSR informs FSM/ASM of channel change
- FSM/ASM confirms information as valid or invalid.
- If valid, an email is sent to the regional LeverEDGE support who validates the reason for the request.
- FSM/ASM completes the channel change form and gets all signoffs from relevant stakeholders.
- Regional LeverEDGE support executes this task on the LeverEDGE system.

 **The Channel & Category Development (CCD) Manager will have to approve any change on the system. This drives compliance where this change is done in the middle of any channel related activity**

### POP Utilities

POP Utilities help us to identify and work smartly around created POPs. Follow the path to view the utilities section:  
**Main Menu >> Setups >> Outlet >> Utilities**



The Following utilities are provided:

- Outlet Search
- Copy Section/ Route utility
- Copy Outlet Permanent Section to Daily
- Copy Section POP Daily to Daily

### Outlet Search

This section is used to search outlets and view their PJP details. POP can be searched By Name, By New Code, By Old Code and By Town which can be selected through drop down option Find POP By. Once the user fills out the criteria of search list of POPs related to that search POP details will be displayed below, as shown in the image below. Follow the link to access this page: **Main Menu >> Setups >> Outlet >> Utilities >> Outlet**

### Copy Outlet Permanent Section to Daily

This section helps user when a permanent section is created, and you want to make it workable on daily basis routine.

To view this section, follow the path below. **Main Menu >> Setups >> Outlet >> Utilities >>Section POP Copy (Permanent to daily)**

### Copy Section POP Daily to Daily

Similar to SKU copy utility, this utility copies an entire section POP daily configuration on to a new section.

**Main Menu >> Setups >> Outlet >> Utilities >>Section POP Copy (Daily to daily)**

### Important to Note: POP Indexing processes

Activation and deactivation of Outlets in Section POP Permanent should only be done on the first day of a new month.

Reasons for this are as follows:

- Indexing outlets in Section POP Permanent while those outlets have IQ leads to the numbers increasing.
- Un-indexing Outlets in Section POP Permanent while those outlets have IQ leads to the numbers decreasing.

Distributors should ensure that Unassigned POPs do not exist in your system at any given point. Either ensure that they are indexed (if outlets are newly recruited) or deactivated from the system (if they are no longer operational or not being sold to).

### Important to Note: POP Tracking

The Regional LeverEDGE supports, working with their FSMs/ASMs and the KDs should on a regular basis ensure tracking & monitoring of POPs is performed. To monitor POP Geo Coding, Unassociated POPs and POPs not Visted, they should ensure they execute the SYSTEM HYGIENE files at least once every month and share findings with the regional Team (FSMs/ASMs/RSMs).

## 5.1 SETUPS: DSRs

The term DSR is defined as “Distributor Sales Representative” of the company. There are three types of sales representatives in the system:

**Order Booker (OB):** is a person who books the orders for different sales outlets in any locality/section. These orders are linked with delivery men who further supply the booked items to the POPs

**Deliver Man (DM):** is a person who delivers / supplies the booked items to the sales outlets. Each delivery man follows a permanent journey plan (PJP) and delivers the goods in different localities.

**Spot Seller (SS):** is a person who visits outlets and sell the product on the spot, instead of booking it first and reporting to the company and then delivering the product.

### CREATE & EDIT DSR

Follow the path below to view this section:

**Main Menu >> Setups >> DSR >> (Order Booker/Delivery Man/ Spot Seller)**

The screenshot displays the 'S&D Pro' software interface for creating or editing a DSR. The top navigation bar shows 'Main Menu' > 'Setups' > 'DSR' > 'Driver'. The main window is titled 'Entry' and contains a form with the following fields:

- Code
- Sales Code: JMKARTA
- DSR Type: DV
- Name
- Reports To: Please Select
- Father's Name
- Civil Status: Please Select
- Spouse Name
- N.I.C. No.
- Blood Group
- Passport No.
- Address 1
- Address 2
- Phone
- Mobile No.
- Date of Birth: 28/07/2015
- Date of Appointment: 28/07/2015
- Employee Code
- Qualification: N/A
- Previous Rep.
- Vehicle: Box Truck
- Driving Licence
- HHT password
- Ledger Account #
- Counter Sales: No
- Status: Active
- Working Nature: Local
- Tower Location
- Territory Head: Please Select
- Device Serial No.
- Commission Stage

At the bottom of the form, there are four buttons: Add, Save, Update, and Delete.

One delivery man can serve two order bookers but on the condition that the selling category is the same

### Processes for DSR Creation

- New DSRs can only be created by the LeverEDGE Support for the region.
- The Creation of DSR must happen at least 7 days before the beginning of the new month to enable all targets to be loaded from CSDP
- Before creation, all infrastructure including Mobility and power bank Must be available for seamless operation of the DSR.
- DSR training is the responsibility of the FSM. The LeverEDGE support will assist where available and on need basis.

## 5.2 SETUPS: PJP

The term PJP is described as a Permanent Journey Plan for any sales representative. PJP describes the regularity and timing of any DSR for visiting different sales outlets for their respective job like order booking, delivery of goods or spot selling.

 **A DSR cannot proceed to his journey without a PJP.**

### PJP Creation

PJP is combination of following three things:

- Selling category – Collection of SKUs
- DSR
- Section – Collection of POPs

PJP (Permanent Journey Plan) is a weekly tour of each DSR that which DSR will serve which section on which day of week.

### Vehicle

This section helps user to describe vehicle specifications that will be used by the sales representative(s). Follow the path to add vehicle information: **Main Menu >> Setups >> PJP >> Vehicle**

The table below shows the important vehicle information needed:

Title	Description
Vehicle	Identification code of vehicle
Description	Type of vehicle
Registration No.	Registration number of vehicle
Color	Color of vehicle
Make	Company Name of vehicle
Model	Model number of vehicle
Chassis No.	Chassis number of vehicle
Engine No.	Engine number of vehicle
Year Manufacturing	Year of manufacturing of vehicle
Supplier	Supplier of the vehicle
Average Rate	Average rate for the use of vehicle
Owner Name	Name of owner of vehicle
Owner N.I.C	N.I.C number of the owner of vehicle
Fuel Type Petrol CNG	Type of fuel consumed by vehicle

**Adding a New Vehicle** - To add a new vehicle:

1. Go to vehicle setup
2. Fill in the required information
3. Click **[Save] button and** system will acknowledge user for successful addition of vehicle



**Modifying a Vehicle** - To modify an already existing vehicle:

1. Go to vehicle setup
2. Select vehicle you need to modify the information for
3. Click **[Modify]** button and system will acknowledge user for successful modification of vehicle.

## Section

Section is basically a group of POP(s) of a certain area, or the routes of visits done by the DSR. It contains all the belts which are followed by the distributors to carry out the process of distribution. It is also said to be DSR one day working in business terms. Follow the path below to create/edit/view this section:

**Main Menu >> Setups >> PJP >> Section**

The following information is needed when creating a Section

Title	Description
Selling Category	Category of the product being sold
Section	Where the sales is being conducted by DSR
Short Description	Short Description of section
Long Description	Complete description of Section
Status	Status shows whether the Section belongs to Rural/Urban/None

## Section POP Permanent

Section is a group of POP(s) to be visited by DSR in a day. User can permanently assign POP(s) for a particular section. The POP that is defined with respect to any selected DSR will be considered as permanent outlet where the product of one category is to be delivered.

Pathway: **Main Menu >> Setup >> PJP >> Section POP Permanent**

## Section POP Daily

This section of the system is non-permanent and takes copy from permanent for the day. It is possible for the user to make any changes in permanent plan, either to add extra POP or remove few POPs. Usually there is no extra change on daily basis but just to handle exceptions, this option is used. Follow the path to view this section:

**Main Menu >> Setups >> PJP >> Section POP Daily**

## PJP

This section keeps record of PJP. PJP is made for the sales representative(s) to ensure the proper service in all the areas. To view this section, follow the path: **Main Menu >> Setups >> PJP >> PJP**

## Create New PJP

This section allows user to create new PJP



## To create a new PJP:

1. Go to PJP setup
2. Select Create New PJP option
3. Fill in the fields in the form that will appear
4. Click **[Save Transactions]** button

## Route One Week

This section enables user to view/edit PJP of one week and user can also edit an existing PJP from here.

**Same for the rest of the button duplicates the week's plan for whole year.**

The following information is needed to edit an existing PJP:

Title	Description
<b>PJP</b>	Identification code of PJP
<b>Category</b>	Category in which DSR will make sales during cycle
<b>Week No.</b>	Number of weeks that will govern the completion of single journey cycle
<b>DSR</b>	Representative that will execute the route, either order booker or delivery man
<b>Status</b>	Status of DSR, HHT or non-HHT
<b>No. of weeks/cycle</b>	Number of cycles completed in a week by order booker
<b>Credit Amount Action</b>	Values denoting instructions about actions with respect to credit sales
<b>Amount</b>	Amount of allowable credit sales for selected DSR

**User can mark the appropriate days when sections will be serviced against their respective check boxes.**

**User can do this for weekly, bi-weekly or alternate weeks.**

## PJP Cycle

This section shows the details of PJP cycle. User can add a new PJP cycle and can delete an already existing PJP cycle. To view this section, follow the pathway: **Main Menu >> Setups >> Others >> PJP Cycle**

## PJP by Cycle

This section enables user to edit PJP with respect to number of PJP cycles.

## PJP Status Change

This section contains a list of all the PJP(s). If a PJP is not working today, then it is marked as inactive. Follow the pathway to access this section: **Main Menu >> Setups >> PJP >> PJP Status Change**

Commonly used information on the PJP status change screen can be seen in the table below

Title	Description
PJP	PJP Code
Name	PJP Name
DSR Type	Type of DSR (e.g. OB (Order Booker))
Category	PJP Category
Status	Status whether PJP is active or inactive
Working Days	Working days of PJP
Partial Upload	Whether to allow partial upload data from device or not
Warehouse	Select Warehouse to be impacted by the sales of that PJP
Stock checking on order	What level of stock restriction be applied on PJP while taking order
Stock checking on delivery	What level of stock restriction be applied on PJP while delivering order
Suggested Gin	GIN will be generated on the basis of this selection
Default GIN factor	Factor of GIN creation, e.g. if suggested GIN is AVG History then what will be its factor
Mobile Booking	Whether to allow mobile booking or not
Upload/Download	Whether to allow upload data or download
Auto Upload	Data should be uploaded to device automatic or should prompt a check
Delivery days	How many delivery days to be set are by default
Deposit Slip	Should be allowed to do deposit slip or not

 **Instead of deleting PJP, it is better to mark it as DEAD.**

 **DEAD PJP means the PJP is inactive permanently, on other hand an active PJP can be marked inactive temporarily.**

## PJP Dead/Alive

If, for any reason a PJP discontinues to function, it is necessary to show that it has become in-active so that a new PJP can be defined instead of this. This section enables the user to mark any PJP as alive (enabled) or dead (disabled). Follow the pathway to view this section: **Main Menu >> Setups >> PJP >> PJP Dead**

## 6.1 TRANSACTION: STOCK RECEIPT

Stock receipt can be described as a form that is issued for receiving the goods. It is also termed as Dispatch Advice (DA). This section is used to record the information regarding the stocks that are received by the KD. This option can be viewed by the following path: **All>>Transactions>>Stock Receipt**

### Manual Entry

This section is used to manually enter the record of received goods. This section can be viewed by the following path: **Transaction>>Stock Receipt>>Manual Entry**

 Click [DA Entry Manual] button to record the entry.

Below table describes the fields in above screen:

Title	Description
Received From	Received from (Company)
DA No.	Dispatch Advice number
Doc Date	Document Date
Warehouse	Warehouse of distributor
Transport Company	Company which is responsible for transporting this DA
Arrival Time	Time of arrival of the truck
Unloaded Time	Time when stocks will be unloaded
Sales Order No.	Sales order number of the shipment
Sales Order Date	Sales order date of the shipment
Vehicle No.	Vehicle number of transportation
Scheduled Delivery Date	Scheduled delivery date of the shipment
Request Delivery Date	Requested delivery date of shipment
Transportation Mode	Transportation mode of shipment e.g. by road, train etc.
Transportation Type	Transportation type of shipment
Transportation Cost	Transportation cost of shipment
Comments	Comments against the shipment (if any)
Vendor A/c	Vendor account for the shipment
Invoice No	Invoice number of the shipment
Shipment No.	Shipment number of DA

 The Manual DA is what is used today to enter stocks from FMCL & Care Global to the KDs. Refer to the SOP on that procedure for more information.

✎ After clicking the [DA entry button] button, user will be directed to the following page:

S.No.	SKP Description / Code	Batch	UNIT	Price	Shipped Qty	Loss Qty	Received Qty	Value
1	OPTION CARCASSON (948.5.00)	S-C	CASE	13752.84	100	3	900	1334390.89
2			SHOON	0.00	4	3	0	
			UNIT	137.48	18	3	30	
			CBSA	0.00	0	3	0	0.00
			SHOON	0.00	0	3	0	
			UNIT	0.00	0	3	0	

## Edit

This section is used to view the list of stocks receipt and edit any if needed, with respect to date. This is only allowed within the same day and if stock is available. To view this section, follow the path: **Transactions >> Stock Receipt >> Edit**

Received	DA #	Doc Date	Location	Warehouse	Sales Order No.	Sales Order Date	Delivery Date	DA Type	Net Amount
✓	0120	28/07/2015	UID Head Office	Gudang Utama	1234567	06/08/2015	06/08/2015	Manual	5,521,722.17
✓	Imran01	28/07/2015	UID Head Office	Gudang Utama	00101	06/08/2015	06/08/2015	Manual	14,712,500.61

✎ Click on DA# to edit the receipt. User will then be directed to the following page

## View List

This section is used to view the list of stocks receipt, with respect to date. To view this section, follow the path. **Transactions >> Stock Receipt >> View List**




## In Transit List

**Pathway: Transactions >> Stock Receipt >> In Transit List**

In transit DA is basically an auto DA that has been generated by SAP. This auto-generated file is called ASN. That needs to be "Accepted" at OSDP. Any DA created through Auto DA will appear as "In-transit" until accepted.

## 6.2 TRANSACTION: CASH MEMO

Cash Memo is considered as a note that is issued when order is received from POP. To view this option, follow the path **All>>Transaction>>Cash Memo**

-  **All transactions (order taking and closing) are expected to be done via the Mobility.**
-  **No cash memo entry is permitted at the Back office by the DTO except for COUNTER SALES.**
-  **All sales captured by the DTO MUST be signed off by the KD Manager/FSM on a physical invoice.**

The main objectives are to:

- Maintain integrity of sales transactions
- Ensure sales is correctly reported in U2K2 and all Reporting platforms.

### Counter Sales

Counter cash memo is the mechanism in business where the distributor can sell directly from KD point to the walk-in customer or specific outlet. This is a cash memo which automates the process of several steps and generates a cash memo at one step time. But this can only be done by a particular order booker for a particular POP.

### Edit List

Cash Memos can only be editable before making it delivered. This section can be used to edit cash memos.

Pathway: **All>>Transaction>>Cash Memo>>Edit List**


### View List

This section contains the list of all cash memos present in the system. It is used for detail view of the cash memos and to 'Cancel' multiple cash memos (**Delivered on same day**) at a time.

Pathway: **All>>Transaction>>Cash Memo>>View List**

### Status Change

The status of cash memos which are available in system in "undelivered" state need to be confirmed & changed as "Delivered" by using this option. To mark a particular cash memo as "Delivered", select its PJP and the document date, specify when it was delivered and click [Save] button.

-  **All cash memos by Spot sellers are expected to be delivered on same day of sales.**
-  **For Order Bookers (OB), all cash memos are expected to be delivered in line with the DM's delivery date**

**Where this is not done, the below will happen.**

1. Sales from OSDP will not flow into CSDP as delivered sales.
2. These figures will not count for the DSR involved and for the KD as sales.
3. This could have impact on the daily reconciliation of manual and system sales.

**To rectify this (if it happens), the following processes will be followed**

- a. FSM/ASM to write to LeverEDGE lead after confirming from DTO and Regional LeverEDGE support.
- b. Approvals to be given based on evidence of warnings to the affected individuals (DSRs or DTOs).

## Status Change PJP

The “**delivered**” cash memos can be marked as “**un-delivered**” by using this application option.

## Cancel List

This is used to cancel the single cash memo or bulk .

## 6.3 TRANSACTION: PICK LIST

### Auto-GIN

GIN stands for Goods Issue Notice. Goods Issue Note (GIN) is generated when the items are issued from the distributor warehouse along with DSR. This section allows users to generate the goods issue note for the sales of particular items in the particular section. This screen can be viewed by the following path:

**All>Transactions>>Picklist>>Auto-GIN**

### Manual GIN

This section allows the users to add the manual GIN entries in the system. To view this section, follow the path:

**All>Transactions>>Picklist>>Manual GIN**

### Edit Manual GIN

This section is used to edit / modify the records of GIN existing in the system. GIN can be modified until day end.

User will have to click on **GIN Number** to edit GIN. Pathway: **Transactions>>Picklist>> Edit Manual GIN**

### View Manual GIN

This section is used to view the records of GIN existing in the system. Pathway to this section is below:

**All>>Transaction >>Picklist>>View Manual GIN**

### Delete Manual GIN

This section is used to delete the records of GIN existing in the system. Pathway to this section is below:

**All>>Transactions>> Picklist >>Delete Manual GIN**

## Rules to making GIN (OB & DM)

1. There must be a one-to-one relationship between the OB and the DM.
2. The DM must be allocated in the same selling category as the OB.
3. Stock should be available.
4. Section must be active for that day.

## 6.4 TRANSACTION: UTILITIES

To view Utilities provided by Transactions follow the path **All>>Transaction >> Utilities**.

The following are the utilities we consider for this section:

- Apply Schemes On-Full PJP
- Delivery DateChange

### Apply Schemes on Full PJP

This section helps the users to re-apply the schemes that exist in system against orders of selected PJP. Only active scheme will be applied on the sales of various items in the system.

Pathway to this section: **Transaction >>Utilities>>Apply Schemes on Full PJP**

 **Only undelivered order will be re-applied.**

### Delivery Date Change

This section is used to change the delivery date of selected PJP(s) in the system. If the user wants to change the delivery date of all orders of PJP instead of doing one by one or per cash memo, then it can be done through this section. To view this section, follow the path: **Transaction>>Utilities>> Delivery Date Change**

 **Cash memo delivery date can only be changed if the status is undelivered.**

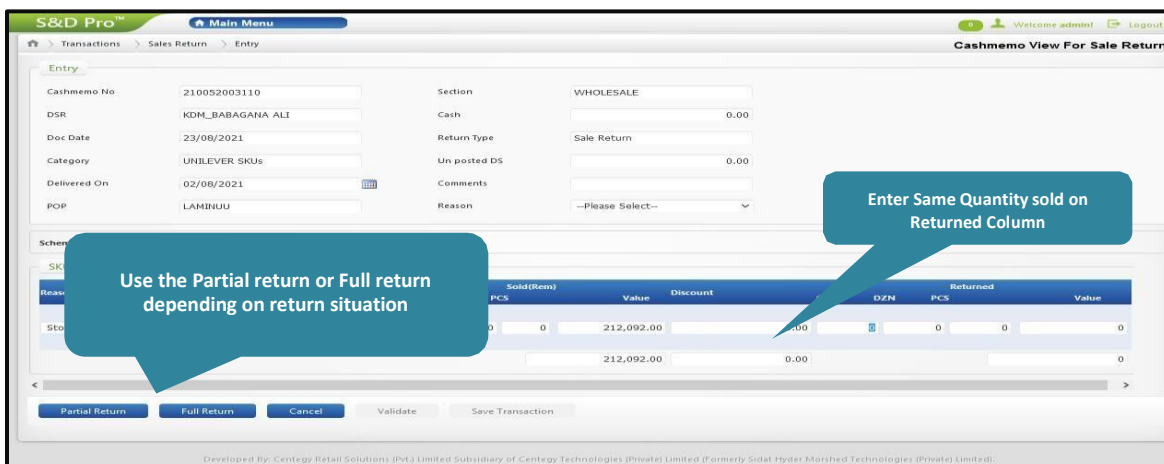
 **Moreover, if scheme apply on delivery date, then re-apply must happen.**

## 6.5 TRANSACTION: SALES RETURN

This option is used to record the sales that are returned by the POP. When goods are issued from the warehouse against any cash memo a goods issue note is generated. There are different reasons due to which goods are returned: Denial for accepting sales by POP's concerned persons, Damaged Items, Expired Items, Wrong Order, No Cash available

### Entry

This section is used to record the Sale Return against any delivered cash memo. To view this section, follow the path: **Transactions>>Sales Return>>Entry**



**Use the Partial return or Full return depending on return situation**

**Enter Same Quantity sold on Returned Column**

Sold (Rem)		Value	Discount	Returned		Value
PCS				DZN	PCS	
0	0	212,092.00	0.00	0	0	0
		212,092.00	0.00			0

**Partial Return**—The user has returned the sales order partially e.g. 10 CS was order but return is 8 CS only. The system will re-calculate the scheme on the returns as well based on the principal cash memo


**Full Return**—The user has returned the sales order completely e.g. 10 CS was order but return is 10 CS as well. The system will re-calculate the scheme on the returns as well based on the principal cash memo.

## View List

This section is used to view the list of sales returns. The pathway is: **Transaction>>Sales Return>>View List**

## Entry W/O CM

This is a cash memo issued when there is no history of previous record that means there is no entry present in the system. The pathway is **Transactions>>Sales Return>>Entry w/o Cash Memo**

 **This entry is not Allowed. Serious sanctions will be given to anyone who is found using this entry without proper Approvals (Documented Approvals)**

## 6.6 TRANSACTION: STOCK RETURN

Stock return is another name for GRN. User can edit, view or delete GRN using this section. To access this option, follow the path: **All >>Transaction>>Stock Return**

### GRN:

**GRN** stands for Goods Return Note. Sometimes unsold stock by the DSR or old stock sitting in the DSR warehouse is returned to the distributor by the DSR, a record of that stock is called as GRN. The GRN has information relating to what has been returned, how much and when. To access this, go to: **Transactions>>Stock Return>>GRN**

### Edit List

This option is used to edit / modify the details pertaining to the goods return note (GRN). It is located in the GRN submenu of the **Transaction** menu. Its complete location is **Transactions>>Stock Return>>Edit List**

### Delete List

This section is used to delete the list of Stock by GRN Number. Pathway: **Transactions>>Stock Return>>Delete List**

### View List

User can also view the list of all GRN(s) using this section. **Transactions>>Stock Return>>View List**

### Manual GRN

This option is used to enter manual details pertaining to the goods return note (GRN) of the sales return or unsold product. Its complete location is **Transactions>>Stock Return >>Manual GRN**



## Important to Note: Sales Transaction Data Check

- FSMs/ASMs/RSMs to conduct monthly check on sales to confirm outlet level sales, sales return and all execution KPIs related to sales are aligned with standard practices.
- Accompaniment records should be documented and review conversations in KDs shared periodically with the LeverEDGE team.

## 6.7 TRANSACTION: RECEIPTS

It is a written recognition for a specified article or sum of money that has been received as a delivery for goods. All the transactions regarding receipts are done in this section. To view this section, follow the pathway;

**All>>Transaction>>Receipts**

### Deposit Slip

When a DSR goes to market to deliver the product, he gets the amount for that. He deposits that money in bank (sometimes it is actual bank and sometimes just a dummy name bank with its name “Accountant”) for which he gets a slip/ receipt. This section contains all the details about the money that was deposited by the DSR. It contains the information about the date of deposition, amount and the type i.e. Cash or Cheque. Also, the information related to the bank is entered here. This section can be viewed by the following path:

**Transactions>>Receipt>>Deposit Slip.**

 **When posting deposit slips, remember when this is done all transactions for the specific PJP for that day.**

### Credit Debit Note Entry

Credit/ Debit Note Entry consists of all the financial adjustment details about the POP(s) that paid less than the amount they had to pay or more than the amount they were supposed to pay back. If the paid amount is lesser than the amount POP had to pay, the debit amount is stored in the system. To view this section, follow the path:

**Transaction>>Receipts>>Credit / Debit Note Entry**

 **This module will be fully utilized when we rollout the Financial Module of LeverEDGE.**

### View List

This section is used to view all the entries of receipts previously made that has been stored in the system. To view this section, follow the path: **Transaction>>Receipts>>View List**

## 6.8 TRANSACTION: ADJUSTMENT

Adjustments are used for stocks, in most cases. This is used to adjust stocks. The pathway for this is

**All>>Transactions>>Adjustments.**

## SAN Entry

User can access this section to adjust the batches of the stock in the warehouse. To access this section, follow the path: **Transactions>>Adjustments>>SAN Entry**. The following are points to note about SAN.

-  **SAN can only be used upon approval by the CD Director & Head of CD Excellence.**
-  **SAN can only be used where other avenues of stock recovery have failed and can only be done by an ADMIN.**
-  **SAN can only be done once a year for a particular KD.**

### Important to Note: Process for SAN

- FSM/ASM writes and gets approval of RSM for SAN
- RSM completes SAN entry form online and gets approval from CD Excellence Head & CD Director.
- LeverEDGE administers SAN. Stock position before SAN & after SAN are taken.
- If SAN is done based on recklessness of team and there are variances above limits, sanctions will be administered to affected KD based on CD Director's consent. Sanctions could get up to lose of TTS

## 6.9 TRANSACTION: PHYSICAL STOCK

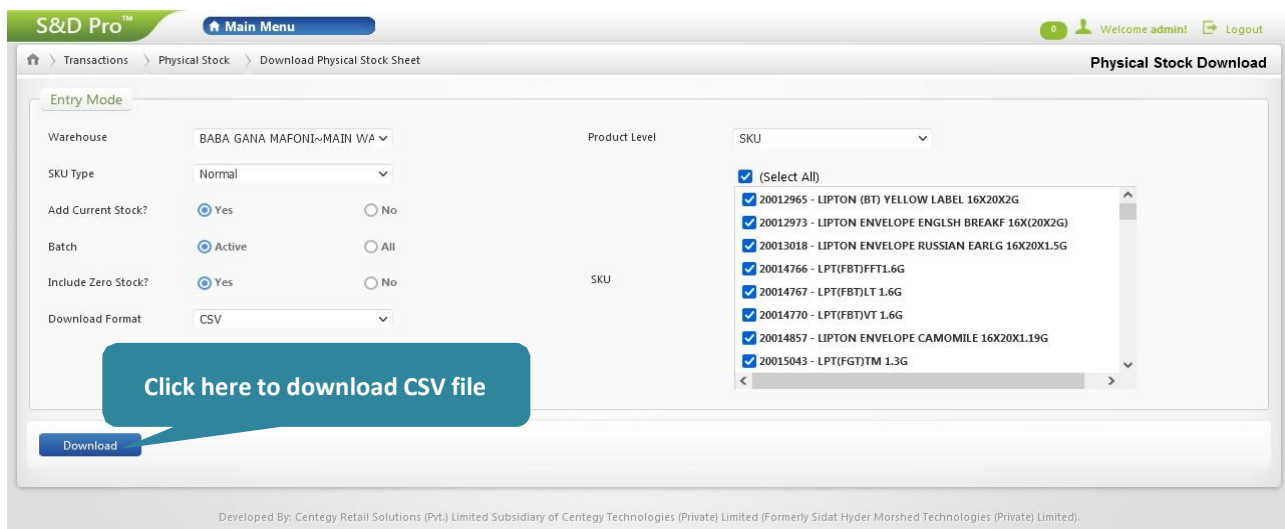
This option helps to perform an activity of physically tallying up the stock with the system stock. Physical quantity of stock that is placed in the warehouses is counted and recorded in the system through this section, and then it will help to compare with system stock on some specific date. To view this option, follow the path:

**All>>Transactions>>Physical Stock**

### Download Physical Stock Sheet

Pathway: **Transactions>>Physical Stock>> Download physical stock sheet**

User can download an entire stock worksheet in excel or CSV for stock take process. Afterwards the filled sheet can be uploaded into the system. User can select the criteria in the screen below and download the worksheet based on the selected criteria, only stock that falls within the selected criteria will be populated in the worksheet.



The screenshot displays the 'Physical Stock Download' window in the S&D Pro application. The window has a top navigation bar with 'Main Menu' and a user status bar showing 'Welcome admin! Logout'. The main content area is titled 'Physical Stock Download' and contains a form with the following fields:

- Warehouse:** BABA GANA MAFONI~MAIN WA
- SKU Type:** Normal
- Add Current Stock?:** Yes (selected), No
- Batch:** Active (selected), All
- Include Zero Stock?:** Yes (selected), No
- Download Format:** CSV
- Product Level:** SKU
- SKU:** A list of SKUs with checkboxes, including (Select All), 20012965 - LIPTON (BT) YELLOW LABEL 16X20X2G, 20012973 - LIPTON ENVELOPE ENGLISH BREAKF 16X(20X2G), 20013018 - LIPTON ENVELOPE RUSSIAN EARLG 16X20X1.5G, 20014766 - LPT(FBT)FFT1.6G, 20014767 - LPT(FBT)LT 1.6G, 20014770 - LPT(FBT)VT 1.6G, 20014857 - LIPTON ENVELOPE CAMOMILE 16X20X1.19G, and 20015043 - LPT(FGT)TM 1.3G.

A blue callout box with the text 'Click here to download CSV file' points to the 'Download' button at the bottom left of the form.

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 All KDs are expected to use the Physical stock sheet for their monthly stock count exercise.

## Upload Filled Physical Stock Sheet

The user will upload the filled worksheet here along with any comments.

To access this, go to **Transactions>>Physical Stock>> Upload filled physical stock sheet**



## Stock View All

Once the Stock is uploaded, the stock adjustment will be available for review here. The user can select the uploaded file and review the stock impact before choosing to finalize reconciliation.

To view, go to: **Transactions>>Physical Stock>>Stock View All**. Once you click on any entry, you will get below screen:

S&D Pro™

Main Menu

Transactions

Physical Stock

Stock Reconcile

Welcome admin!

Logout

Physical Stock Process

Document No2021000002

							System Stock			Physical Stock			Difference Stock				
SKU Description	SKU	SKU Type	Case Config.	Unit Price	Batch	CS	DZN	PCS	CS	DZN	PCS	CS	DZN	PCS	Diff. Amount	Reason	
LPT(FBT)FFT1.6G	20014766	Normal	16	250.60	1-1	0	0	0	3	0	0	3	0	0	12,028.80	Robber	
LPT(FGT)TM 1.3G	20015043	Normal	16	250.60	1-1	0	0	0	2	0	0	2	0	0	8,019.20	Robber	
LPT(HI) HI 2G	20015718	Normal	16	250.60	1-1	0	0	0	8	0	0	8	0	0	32,076.80	Robber	

Process

Discard

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## Stock Reconcile

This function facilitates user to reconcile the difference between uploaded physical stock sheets with the system generated stock sheets. If there has been any mismatch in the stock or stock is not updated, this utility is used. The pathway is: **Transactions>>Physical Stock>>Stock Reconcile**

### Important to Note: Physical & System stock reconciliation

- All mobility devices must have ended day for the previous day by the DSRs
- All outstanding cash memos must have been delivered by the DTO
- The DTO should ensure that the Back-office system should have day ended the previous day's sales and the working date should be the same as the date of the stock take.

 Please refer to the stock count SOP from O2C to see full stock count process.

## 6.10 TRANSACTION: TRANSFER INVOICE (Return Advice)

When stock is transferred from one location to other, its transfer invoice is created. This transfer invoice is also called Return Advice (RA). Normally this document is used to send back stock from distributor to company. To view this section, follow the path: **All>>Transactions>>Transfer Invoice**

 **In transfer invoice, stock is subtracted directly from the OSDP system.**

### Entry

This section helps user to add a Transfer invoice in the system. When any specific Distributor/KD needs to send damaged/ expired/ excess stock back to company, their transfer invoice / return advice is generated through this section. To view this section, follow the path: **Transactions >> Transfer Invoice >> Entry**

### Edit List

This option is used to edit / modify the records of transfer invoice documents existing in the system within the same working day. This section is comprised of the list of editable transfer invoice(s) that have been created in the system previously. User will have to click on **Doc No** to edit the record. To view this section, follow the path: **Transactions>>Transfer Invoice>>Edit List**

### View List

To view the list of all the transfer invoices that have been made before, this section can be used. User has to specify the date in the given fields for which invoice needs to be viewed. To view this section, follow the path: **Transactions>>Transfer Invoice>>View List**

### Important to Note: Processes for Return Advice (RA)

- RA can be done based on unwanted stocks delivered to the KD that are either damaged, short packed or expired. ***This is called RA based on DA.***
- All identified stocks **MUST** be entered into the OSDP system once the stocks have been offloaded and alignment signed off with the Transporter.
- RA can also be done based on stocks sitting in the KD warehouse that are either damaged or expired.
- For these scenarios, the FSM/ASM must confirm validity and agree in writing with the CD Ops team before proceeding to instruct the KD to do RA.
- RA can also be done when there are stock transfers between KDs. However, this must be done only when stocks have arrived the receiving KD, and credit notes have been administered to the giving KD. In the absence of credit note, there must be a communication from CD Ops & CSE as evidence that RA should be done.

 **No RA aside [RA based on DA] should be done without approvals from relevant stakeholders.**

## 7.1 PROCESS

This option enables the users to carry out some processes carried out in the system. These reports are useful at the branch end, as well as at the head office end for the managerial purposes and making decisions regarding the sales and distribution of the stock. Follow the path to access this option: **Main Menu>>Process**

## 7.2 PROCESS: DAILY CLOSING

### Day End Process

This section facilitates the users in ending a day's activities by posting the final transactions to the ledger after reconciling the sales and stock for all the transactions performed during the day. To execute this section, follow the path: **Main Menu >> Process >> Daily Closing >> Day End Process**

### Generate Backup

This section is used to help user generate backup of database. To view this section, follow the link **Main Menu >> Process >> Daily Closing >> Generate Backup**

### Day End Process - PJP

This section is used for enabling PJP(s) who have completed their day's activities to mark their day end separately, to download their tasks for the next before the day ends.

Pathway: **Main Menu >> Process >> Day End Process – PJP**

### FCS DSR Process

FCS is a combination of Three KPIs: ECO (Effective Coverage), BP or PC (Bill Productivity or Productive Call) and LPPC (Lines per productive call). FCS DSR targets (Policy setups) are loaded on CSDP, and this section is used by the DTO to process this on OSDP. The pathway is: **Main Menu >> Process >> Daily Closing >> FCS DSR process**

### EFOS Process

Effective Day Report provides a measure of the market working hygiene of Distributor Salesmen. EFOS is a composite measure of the time spent by the salesman in the market and the number of outlets he has visited for the day, based on PJP. Pathway - **Main Menu >> Process >> Daily Closing >> EFOS process**

 **EFOS is count based report; KPIs are relevant to Salesman and does not apply to Outlet Type and Outlet Subtype. KPIs are relevant at the KD, Area, and Region level for aggregation.**

 **Other processes include iQ Process; iQ 4P (OUTLET) Process; FCS HPC Process**

### Important to Note: Guidelines for all FCS, iQ & EFOS Processes

- All processes must be completed between the 2<sup>nd</sup> and 5<sup>th</sup> of the new month to download new month targets on OSDP.
- Daily execution of these processes is highly recommended so as not to miss out on downloading any update from CSDP.
- All targets must be confirmed for all DSRs.
- All FSMs/ASMs to request these reports from the KD Back Office.
- Any issue(s) noticed should be escalated to the Regional LeverEDGE Support for resolution.

 **Issues not escalated on time will not be resolved and impact will be on FSM/ASM and KD.**

## 8.1 OTHERS: SECURITY

It is necessary to maintain a secured access of the system so that an outsider cannot access your system. This option facilitates the user to perform security related operations. It can be accessed by following the path:

**Main Menu >> Others >> Security**

### Designation

This section stores the access level rights users created. These designations correspond to access level, or the working roles related to the application.

This section can be accessed by the following path: **Main Menu >> Others >> Security >> Designation**

The fields to be filled are defined below:

Title	Description
Code	An Identification code assigned to the user
Short Description	Short Description about designation of the user
Long Description	Long Description of designation of the user

### User Rights

There are different types of users having various levels of rights to use the system. Hence, administrator can set the access level rights according to the need, using this section of the system. This section can be viewed by following the path: **Main Menu >> Others >> Security >> User Rights**

### Users

This section helps to record the details about new users of the system. To view this section, follow the path:

**Main Menu >> Others >> Security >> Users**






Following table shows the fields to set up the details of the Users

Title	Description
User ID	Identification name of each user
Designation	It is the role that will be used by a particular user
Name	Full name of the user
Password	Password created for the user account
Expiry Days	Number of days after which the account will be expired from the day of creation
Expiry Alerts	Number of days, when alert will issue
Password Width	Width of password
Password Element	Showing either the password is character or alphanumeric or both
Password Policy	Number of last passwords that cannot be used
Status	Status showing whether the account is Active/Inactive

## User Profile Definitions

Below are the user profile definitions available in LeverEDGE for Nigeria. Most of the USER\_ID are child records in the Database hence there is need to maintain the convention while creating new Users

USER_ID	NAME	EMPLOYEE CLASS	ROLES ASSIGNED
ACT	Distributor Accountant / Finance	KD	KD Financial (Stock, Fin. Module, etc)
ADMIN	Administrator	UNILEVER	All system modules (Master Data, setup, etc)
TSM	Territory Sales Manager	UNILEVER	Basic reports and POP approvals
ASM	Area Sales Manager	UNILEVER	Basic reports and POP approvals
RSM	Regional Sales Manager	UNILEVER	Basic reports and POP approvals
KDM	Distributor Manager	KD	Transactional/KD Financial
DTO	Distributor Operator	KD	All roles in the KD (Excluding Admin roles)
OPS	LE Support / LSM	UNILEVER	All Roles for assigned KDs
DT Supervisor	DT Supervisor	DT	Same as KDM
Promo Sales Ops	Promo Sales Ops	UNILEVER	Scheme & Promo roles
CD Master Data	CD Master Data	UNILEVER	Master Data, System Setup roles
Claims View	Claims View	UNILEVER	Scheme, Promo & Fin Modules, Claims
DT Owner	DT Owner	DT	Basic reports, KD Financial roles.

-  All IDs for Unilever employees cannot have access to the KD system.
-  They must either sit on the system or request control from the DTO using Team Viewer or Any Desk Application.
-  Only the DTO's system has authorization to sync data to H/O as it has other support applications to enable this.
-  Every other employee under KD class has READ ACCESS to SNDPro.
-  To have a WRITE ACCESS, approval has to be given by the RSM, LeverEDGE Lead & Head of CD Excellence.

## Important to Note – Users (Unilever Employees)

- Users' rights are only given to Field Employees. Active Head office Users are either part of CD Excellence Team or have a responsibility on the system for certain rights. (e.g Geography IT)
- Field employee rights are mainly for POP approvals.
- Users (Filed employees) Must be Mapped to KD(s) where they can approve POPs for.
- A User can be mapped to 2 or more KDs depending on the designation. RSMs can be mapped to more than 1 KD in their regions.
- All Users managing KDs also have profiles on each of the KD system apart from the right to approving POPs. These profiles give them access based on modules assigned to them.
- All Users on the system will be reviewed on Monthly basis. This is to help clean up ACTIVE users' account.
- In the event of a Field Employee being redeployed to the Head Office, his or her account will be made INACTIVE except there is need for him/her to continue having access to the system.



8. For Users who have left the Business, a confirmation email from the CD HRBP will be enough to deactivate the account.
9. All Deactivated accounts will remain deactivated and cannot be given to another employee.
10. For New Users, an email approval from the User's Line Manager and the LeverEDGE lead will be required after which a New User form will have to be completed online by the prospective user.

### Important to Note: Users (KD employees)

1. KD Users are limited to only the positions listed above. In the need for any additional user creation, this MUST be approved by the Head of CD Excellence.
2. Usernames are different from USER ID hence 1 person is permitted to have 2 USER ID with same name. E.g if the KDM doubles as the accountant, the person will be created as both KDM and Accountant on the system.
3. It is also possible for 1 Username to reflect in 2 KDs. This is only applicable to KDs that run more than 1 account with Unilever and have central employees who oversee these businesses. E.g an Accountant in Renuzi Ketu could be the same Accountant for Renuzi Lekki. This means the user will have same Username in different KDs.
4. Same usernames but different roles are also possible for these users in point 3 above.
5. Users' review will happen monthly with FSM or DTO sharing with the LeverEDGE Team the list of Active users by KD so constant cleanup can happen.
6. Usernames of Users who have exited KDs will be replaced with the new ones. The process of replacement will be done based on the confirmations in point 5 above.

### Change Password

As the name depicts, this option is used to change the password of existing users of the system.

 **Only Administrator has the rights to change passwords of users of the system.**

This section can be accessed through: **Main Menu >> Others >> Security >> Change Password**

The following table shows the fields to set up the details of the Users:

Title	Description
User ID	Identification name of the user
Existing Password	Current password of the user
New Password	New password of the user
Confirm Password	Re-enter new password of the user

## Important to Note: Password Management.

1. All Unilever employees receive a default password once their accounts are created. It is advisable to change these passwords as soon as they are received.
2. The validity period for every password is 90 days hence users must ensure they change their passwords every 90 days. Work is ongoing on a password prompt for remind users on this task but in the meantime, manual change is required from each user.
3. Any account not used after 180 days will automatically be deactivated until there is need for the user to make use of the account.
4. For reactivation, an email approval will be required by the LeverEDGE Lead.
5. No User is expected to pass on his or her password to another user. This will be treated as a serious offence and the Unilever Password management policy will be applied.
6. For the KD employees, options 1 – 3 apply for password management.

## User Scheme Builder

Defining a new scheme should be entitled to certain people to abstain from any kind of faults to the whole system. This section is used to define users who can define new schemes and change their status as active or inactive using Scheme Builder. These users have a right to modify or authorize schemes. This section can be accessed by the following path: **Main Menu >> Others >> Security >> User Scheme Builder**


## Menu Re Arrange

Menu Re Arrange option of the system allows admin user to set required option and turn off the unwanted ones which will give a neat look. S&D Pro Menu can be controlled using this screen. This section can be accessed by the following path: **Main Menu >> Others >> Security >> Menu Re-Arrange**


## 8.2 OTHERS: AUDIT MENU

### Last Sync View

This section is used to view the last or the latest synchronization of data with national database of different distributors. The pathway is **Main Menu >> Others >> Audit >> Last Sync View**

 **Quick sync execution MUST be done at least twice daily (In the Morning upon resumption and at COB after all transactions have been concluded). Morning Sync MUST be done before the DSRs start their day on Mobility.**

 **This also applies to IG Download & Upload. (Morning after Quick sync is successful to ensure all relevant data is pushed to the Mobility.**


 **Avoid executing Quick Sync & IG Download/Upload at the same time as Quick sync is to get data from CSDP to OSDP and IG is to get data from OSDP to Mobility of Vice versa.**


### Update Log

This section helps you to view application releases updates. To view this section, follow the path: **Main Menu >> Others >> Audit >> Update Log**

## Day End Log

This section is used to view daily closing with closing time and date for updates. To view this section, follow the path **Main Menu >> Others >> Audit >> Day End Log**

 **KDs must perform Day end every day at the close of Business. Any delay in this process MUST be properly communicated beforehand. If delay is due to any issue, a ticket MUST be logged adequately.**

 **Backups MUST be taken properly before and after every Day-End process and stored in an external hard drive. This helps restore previous transactions in case of any system issues.**

## Update Log Consolidate

This section is used to view detailed information regarding updates at distributors end. This section contains option to view updates from distributor to head office or to view updates from head office to distributor. To view this section, follow the path: **Main Menu >> Others >> Audit >> Update Log Consolidate**

## Scheme Log

This section is used to view the schemes. Scheme log can be viewed using two search criteria, scheme type or scheme user. Scheme log will be shown on the page as soon as the criterion is filled. To view this section, follow the path **Main Menu >> Others >> Audit >> Scheme Log**

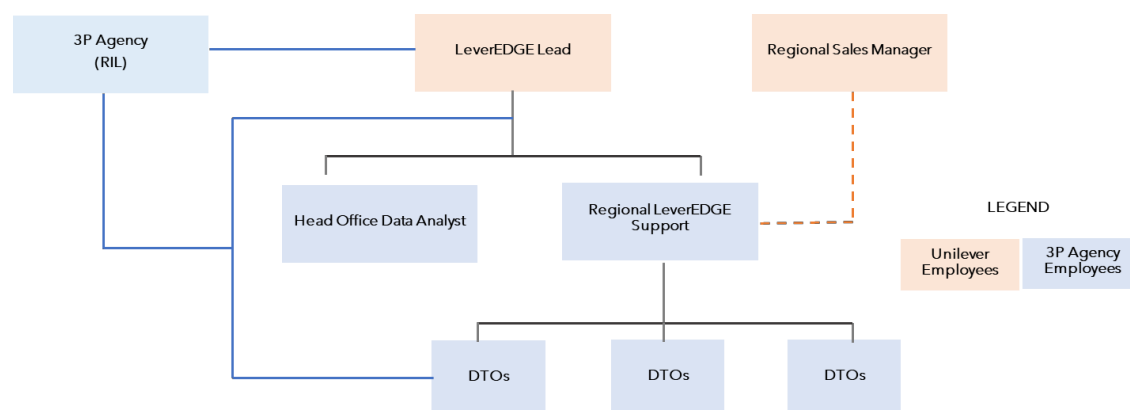
# 8.3 OTHERS: SYSTEM GENERAL AUDIT

With every process outlined therein within this SOP, it's important to note the below audit processes for LeverEDGE Operations.

## Guidelines for LeverEDGE General audit

1. All system processes will be audited at least once every 3 months by the CD Excellence team (led by LeverEDGE Lead).
2. Processes to be audited include
  - a. Universe Integrity
  - b. Transactions (Sales & Stock, SAN, DA, RA)
  - c. Users & Passwords.
3. Defaulters who appear on the list will be issued warning emails if there are no valid reasons backing up the actions on the system.
4. On Users (Unilever employees), there will be revoking of usage right after 3 consecutive defaulting without proper explanations. This access will be re-instated after the user must have completed a mandatory training on system usage and approved by the LeverEDGE Lead & Head of CD Excellence.
5. All Audit reports (Audited KPIs, adherence to practices, etc) will be shared with the CDLT after every audit. The CDLT reserves the right to sanction any user if found guilty of any system practices and guidelines as stated in this SOP.

## 9.1 STRUCTURE: LEVEREDGE TEAM



## 9.2 ISSUE LOGGING PROCESS

### Guidelines for Issue Resolution

1. DTOs are expected to log all issues encountered and assign to their Regional LeverEDGE Support.
2. Issues will be differentiated by the Regional LeverEDGE Support into OSDP & CSDP related.
3. All OSDP related issues are to be resolved by the Regional LeverEDGE Support. He or she is free to take help from the Head Office Analyst. However, issues not resolved within stipulated SLAs will be recorded against the Regional LeverEDGE Support.
4. All CSDP related issues are to be resolved by the Head Office Analyst or any assigned LeverEDGE support trained to resolve such issues.
5. Any OSDP issues that cannot be resolved by the Regional LeverEDGE support will be assigned to the Head Office Analyst. In case of no solution, the LeverEDGE Lead will be assigned the issue.
6. Application related and product support issues that cannot be handled locally will be assigned to the Global Support Teams responsible for such issues.
7. All issues are expected to be resolved within specified SLAs (Service Level Agreements)

### Service Levels Agreement (SLA) defined according to issues priority

Incident Type	Definition	Response SLA	Resolution SLA
P1	Urgent	15 Business minutes	4 – 6 Business hours
P2	High	30 business minutes	6 – 12 Business hours
P3	Medium	8 Business Hours	24 Business hours
P4	Low	24 Business hours	180 Business hours

## Definition of Incident Types

Incident Type	Definition
P1	<ul style="list-style-type: none"><li>• All KDSRs not able to perform sync</li><li>• Users cannot access DB</li><li>• Missing goods due to ASN failure</li><li>• Stock mismatch between BW &amp; LeverEDGE, impacting DBR &amp; invoicing</li><li>• All Network down</li><li>• DB crash</li></ul>
P2	<ul style="list-style-type: none"><li>• Certain KDSRs not able to perform sync</li><li>• Some Users cannot access DB</li><li>• Stock delivered without ASN (ASN not dropping on the system)</li><li>• Basic Mobility errors</li><li>• Issues affecting capture of all transactions</li></ul>
P3	<ul style="list-style-type: none"><li>• Report generation issues</li><li>• Transaction issues for few DSRs</li><li>• Manual DA related issues</li></ul>
P4	<ul style="list-style-type: none"><li>• Backup related issues</li><li>• RA related issues</li><li>• Monthly process &amp; Target loading issues</li></ul>

## 10.1 REPORTS

LeverEDGE reports are available at OSDP & CSDP Levels. The following are the key reports which help us in ensuring day to day business tracking and information analysis.

### List of commonly used reports

- Sales Reports
- Coverage Reports
- iQ reports
- FCS reports
- Assortment reports
- eFOS reports

To view this section, follow the link **Main Menu >> SNDPro Reports >> Central Report DT Version**

 **Breakdown of each report is as shown below.**

### Sales Reports

This section is used to help generate sales reports for specified periods. These periods could be Daily, Weekly, Monthly, Quarterly, etc.

### Coverage Reports

Coverage can also be called Effective Coverage (ECO) and is measured primarily at POP (outlet) level. ECO is achieved if an outlet makes at least one purchase in the period under consideration (monthly, weekly, quarterly, yearly, etc). Coverage reports are also called Distribution reports as they measure distribution and penetration within the Distributors' territories.

### FCS Reports

FCS is an acronym for Field Capability Score. It is a combination of three KPIs: ECO (Effective Coverage), BP or PC (Bill Productivity or Productive Call) and LPPC (Lines per productive call).

### Definition of Terms

**Bill Productivity or Productive Calls:** Are list of outlets that have bought within a particular period (Day, Week, Month, Quarter, Year, etc).

**Lines Per Productive Call:** Average number of SKUs sold in the stores Redline are the list of base-packs that have high probability of being out of stock at the given outlet. Redlines are aimed at reducing out of stock.

 **Thresholds for all FCS KPIs are defined based on Business objectives and communicated to the team periodically.**

 **The KPIs can also be measured individually to track progress of each KPI vs thresholds required.**

## iQ Reports

These reports measure iQ KPIs such as Red Line (RL), Everbilled (EB), New Product Distribution (NPD) & Width Pack (WP) basically at outlet level. The various iQ KPIs help to drive increased Assortment in the various outlets.

### Definition of Terms

**Everbilled (EB):** Are products (SKUs) which has been sold at least once in the last six months in an outlet.

**Red Lines (RL):** Redline are the list of base-packs that have high probability of being out of stock at the given outlet. Redlines are aimed at reducing out of stock

**New Production Distribution (NPD):** Innovation SKU for the outlet type.

**Width Pack (WP):** Recommended pack that has high probability to sell in an outlet where substitute or alternative SKUs are selling. (eg: Omo 900g where SL 900g is selling).

The targets for RL & EB are derived using the sales history of the stores over a period. Maximum period is 12 months of sales while minimum period is 3 months, and the stores are expected to achieve a specific threshold of these targets. NPD (Innovation) & Width pack (CotC) are country specific input given on need basis.

 **Thresholds for all iQ KPIs are defined based on Business objectives and communicated to the team periodically.**

 **The iQ KPIs can also be measured individually to track progress of each KPI vs thresholds required.**

### Assortment Reports

Assortment reports measure the efficiency of our in-store execution, which is primarily driven by the 4 iQ KPIs (RL, EB, NPD & WP). Currently, we measure Perfect Assortment and Assortment Growth.

**Perfect Assortment** is measured as shown below

$$\text{Perfect Assortment} = \frac{\text{No of outlets achieving Assortment Target}}{\text{No of outlets having Assortment Target}}$$

**Assortment Growth** report is measure of current year Assortment vs last year's Assortment. The calculations are as shown below

$$\text{Assortment Growth} = \frac{\text{Current Year Assortment}}{\text{Previous Year Assortment}} - 1$$

 **Targets for Perfect Assortment & Assortment growth are defined based on the Business objectives and communicated to the team periodically.**

## eFOS Reports

eFOS is an acronym for Effective Feet On Street, measured on Daily basis. It provides a measure of the market working hygiene of the Distributor Salesmen. EFOS is a composite measure of the time spent by the salesman in the market and the number of outlets he has visited for the day, based on PJP. The calculation is as below

$$eFOS \text{ Salesman} = \frac{\text{Effective Days}}{\text{Total Working Days}}$$

The elements of 'EFFECTIVE DAY' are:

- Effective outlet time (Time spent in taking orders in the stores)
- **PJP Compliance:** No. of outlets where orders are taken / Active outlet within a PJP of the day
- **Geo Match:** No. of outlets visited & Geo Code matched / Actual outlets within a PJP of the day


Any of these 3 KPIs can be turn on/off. If it is turned on, it will be included in compliance and vice versa.

 **Thresholds for all eFOS KPIs are defined based on Business objectives and communicated periodically.**

 **The KPIs can also be measured individually to track progress of each KPI vs thresholds required.**

## Important to Note: Guidelines for Reports

- All key reports are expected to be used by the Field Teams for performance reviews and measurements.
- Some reports or KPIs that make up the reports may also form part of the payment criteria for Distributors' TTS, Unilever Sales Managers Incentives, KDSRs Incentives and other business-based incentives where applicable.
- For reports to be visible at the back office, monthly processes MUST be run on all Distributors systems by the DTOs. FSMs to ensure this happens and report back to the LeverEDGE support team if they have any issues.
- Review of these reports are mainly to be done at Distributor & Regional levels, by the FSMs, ASMs and RSMs.
- The LeverEDGE Lead & the CD Excellence Lead will hold periodic reviews at least once every Quarter. Quarterly Reviews will also happen with the non-Performing teams to understand their concerns and proffer solutions.

 **There are no set timings for the frequency of territory and regional review of reports as these will be at the FSMs', ASMs', or RSMs' discretion.**



