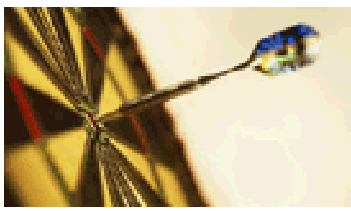
User's Guide



Target Account Planner

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TARGET ACCOUNT PLANNER 1

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Target Account Planner

OVERVIEW

What is Target Account Planner?

Target Account Planner is a tool to help you plan, manage, and track sales activities. It allows sales and marketing personnel to view business plans, sales data, and related information individually or for a group of accounts. They can also run reports, order product samples, manage target projects, and communicate with each other on matters related to an account.

Target Account Planner provides a common customer information database, eliminating duplicate entry of information. It contains all customer accounts in Vista, allowing you to choose which ones you want to be your target accounts.

Target Account Planner replaces Vista's Customer Setup screens as the means of creating new customer accounts and it provides electronic versions of distributor forms, replacing the printed versions of those forms and reducing the time and effort required to process them. Also, instead of using SIC codes as a means of classifying customers, Target Account Planner introduces a new, simpler classification system called segments.

Target Account Planner displays customized home pages for sales engineers, district managers, zone managers, Global Sales and Solutions (GSS) staff, and marketing personnel, making it easier for you to find the information you need. Also, credit dollars - the dollars used in incentive calculations for salespeople - are only viewable by sales people; credit dollars are no longer viewable by the marketing divisions due to the security restrictions that exist in Vista. The marketing divisions are able to see charge-to and end market dollar values.

What are Target Accounts?

In order to more effectively use the resources of the sales organization, sales engineers, district managers, and marketing personnel can identify customer accounts for whom sales engineers should focus their sales efforts. These customer accounts are called *target accounts* and they are the basis of Target Account Planner, which provides tools to manage sale plans and track efforts towards gaining business with target accounts.

Accessing Target Account Planner

To access Target Account Planner:

1. **Log on to JOE.**
2. **Click the Tools tab.**
3. **In the Sales Resources channel, click the Target Account Planner link.**

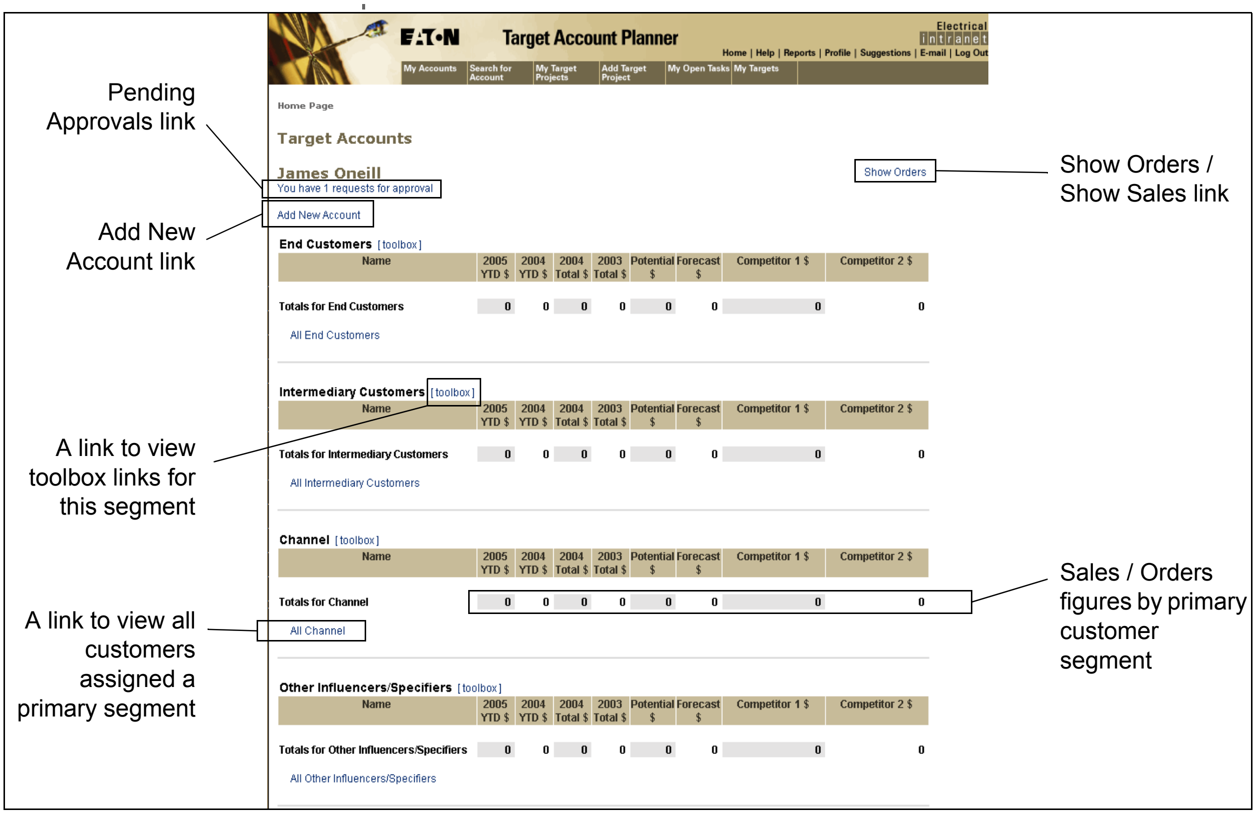
   The Target Account Planner home page appears.

Note: If you do not see the Sales Resources channel, click the Content link at the top of the page and then, on the Content page that appears, look to see whether the Sales Resources channel is checked. If you do not see the Sales Resources channel on the Content page, then contact the Global Support Center by e-mail at GlobalSupport@eaton.com or by phone at 216-523- HELP (4357), Adnet 621-HELP (4357).

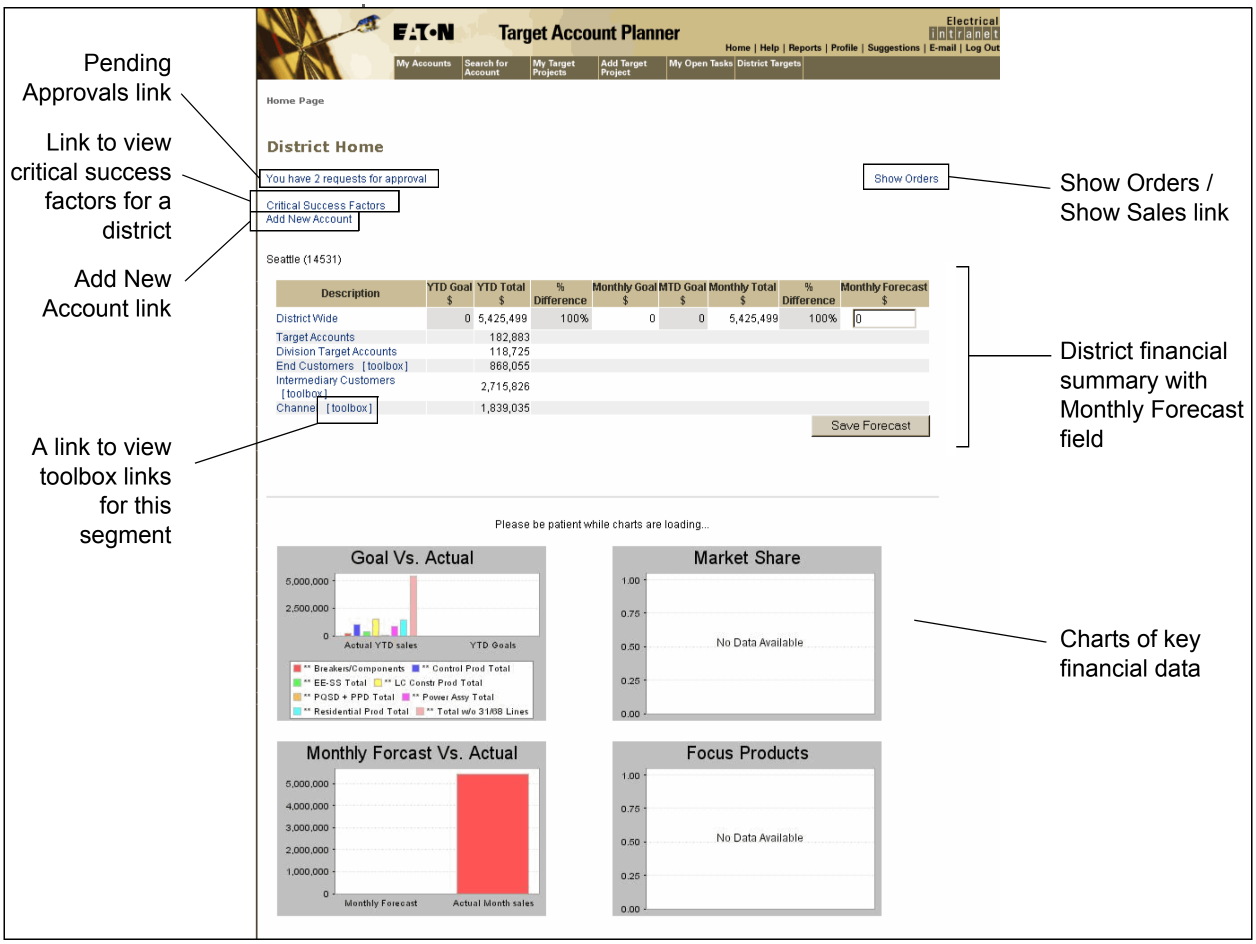
The Target Account Planner Home Page

What you see on the Target Account Planner home page is determined by your role, as defined in your profile.

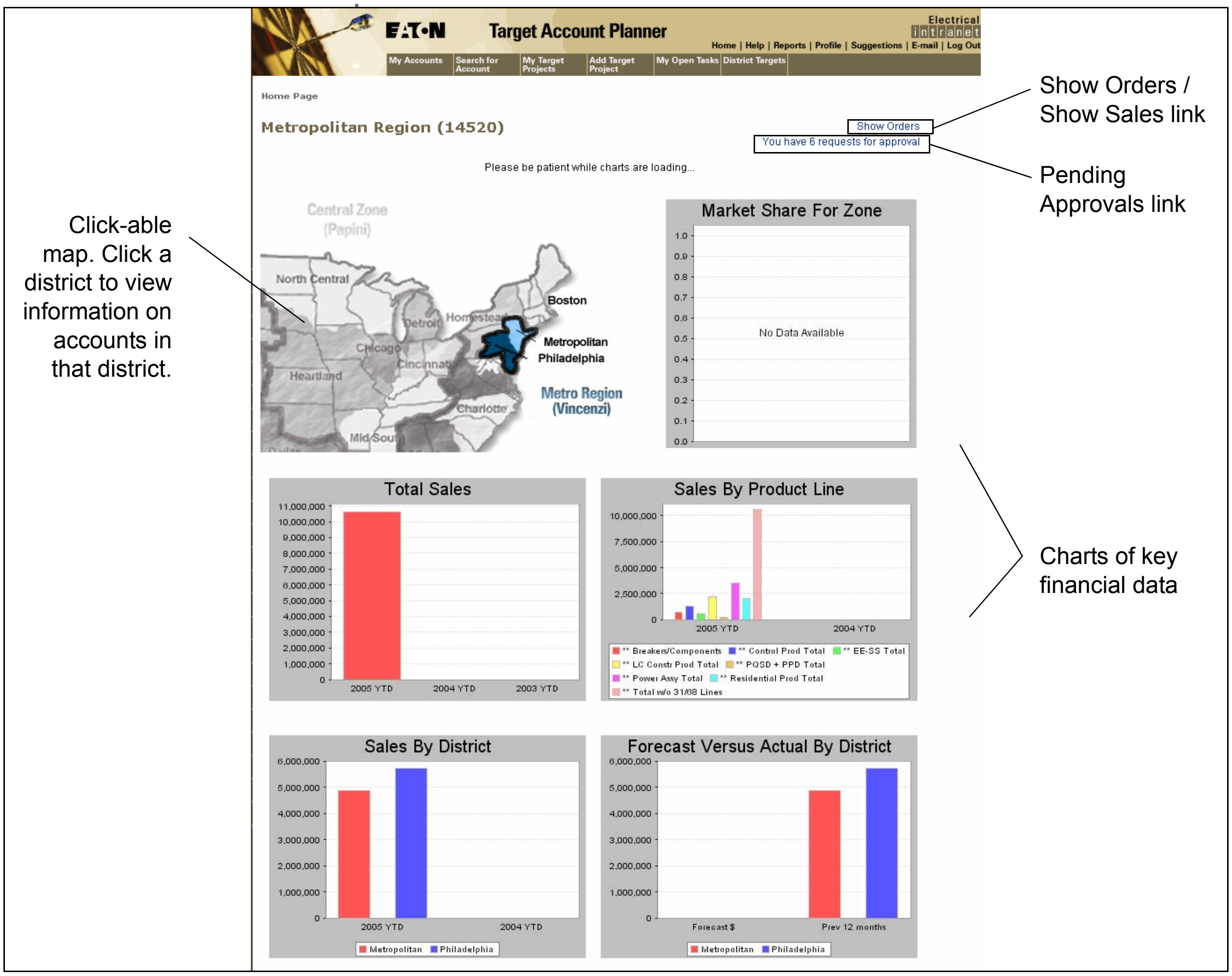
The Sales Engineer Home Page



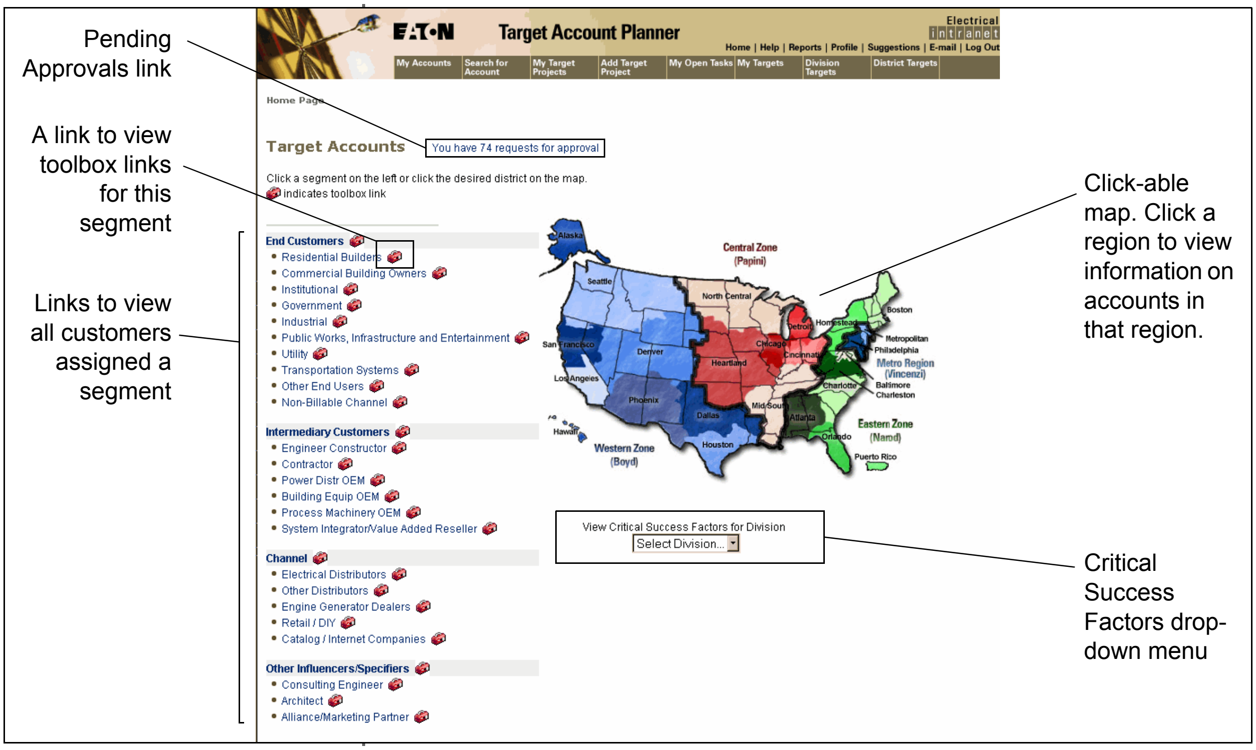
The District Manager Home Page



The Zone Manager Home Page



The Division Manager, Global Channel Manager, or Credit Manager Home Page

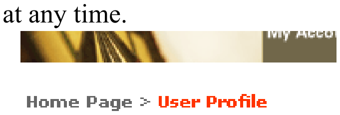


Navigating Target Account Planner

The Target Account Planner pages have the following conventions for navigating from one page to another.

The Navigation Bar

Underneath the picture of the dartboard in the upper left corner of the page is a navigation bar. This bar will display a series of links from the home page to the current page that you are viewing, making it easy to know where you are and to re-visit a previous page at any time.



Target Account Planner Tabs

At the top of all pages, there is a set of tabs that you can click to navigate to other pages. These tabs change depending on what information you are currently viewing. The following table describes which tabs appear for which pages.

Note: You may not see all of the tabs listed. Target Account Planner chooses which tabs to display based on your profile.

Table 1: Tabs in Target Account Planner

When you view this…	These tabs are available…
Home page	• My Accounts • Search for Account • My Target Projects • Add Target Project • My Open Tasks • My Targets (Sales Engineers only), District Targets (District and Zone Managers only), or Division Targets (all other)
Any customer account-related page	• Account Profile • Sales Plan (only if user has permission) • Product Potential Mix (only if user has permission) • Sample Request (only if user has the ability to update the account) • Customer Projects (only if user has permission) • Target Market (Distributors Only) • Log Visits • Toolbox
Any reports-related page	• Standard Reports • Project Reports • Sample Reports • Other Reports

Links Available On Every Page

In addition, in the upper-right area of the page, there is a set of links that appear on every page.

The following table describes these links:

Table 2: Links Available On Every Page

This link…	Does this…
Home	Opens the Target Account Planner home page.

Table 2: Links Available On Every Page (Continued)

This link…	Does this…
Help	Opens the documentation for Target Account Planner in a new window.
Reports	Opens the Standard Reports page.
Profile	Opens a page that displays your profile information.
Suggestions	Opens a page where you can submit a request to improve Target Account Planner.
E-Mail	Opens a blank e-mail message for you to use to communicate any issues with Target Account Planner.
Log Out	Closes the Target Account Planner window that you are viewing.

What is Your Target Account Planner Profile?

Your profile determines the information that you can see on the Target Account Planner pages. Most of the information for your profile is stored in Vista - the only field that you can change in Target Account Planner is the Customer Listing Dollar Type field.

Updating Your Target Account Planner Profile

To update your Target Account Planner profile:

1. **At the top of the page, on the right side, click Profile.**

   The Profile page appears, displaying your information.

2. **If desired, click the Customer Listing Dollar Type drop-down box and select a type.**

   The Customer Listing Dollar type determines the amounts displayed on pages that show sales data.

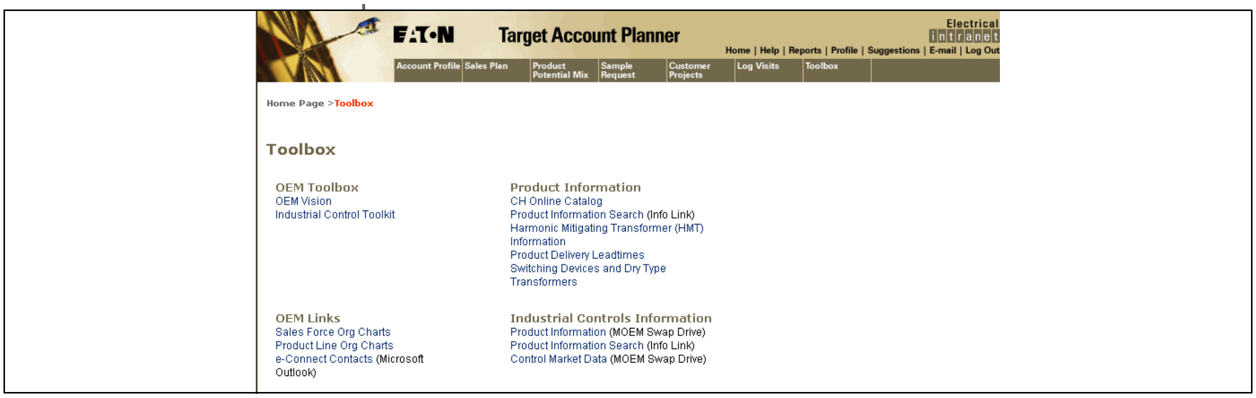
   - If the Charge To Dollars option is selected, then sales figures will reflect dollar values for the customers that were billed or received invoices for the orders.
   - If the End Market Dollars option is selected, then sales figures will reflect dollar values credited to the customers who actually receive and use the products.

3. **Click the Save button.**

   Your profile is saved.

What Is The Toolbox Page?

The Toolbox page is a collection of links to documents or other information that can help support sales efforts. There is a toolbox page for each segment.



Note: If you wish to add or change a link on a toolbox page, then you must submit a request using the RequestIT form available from the IT channel in JOE.

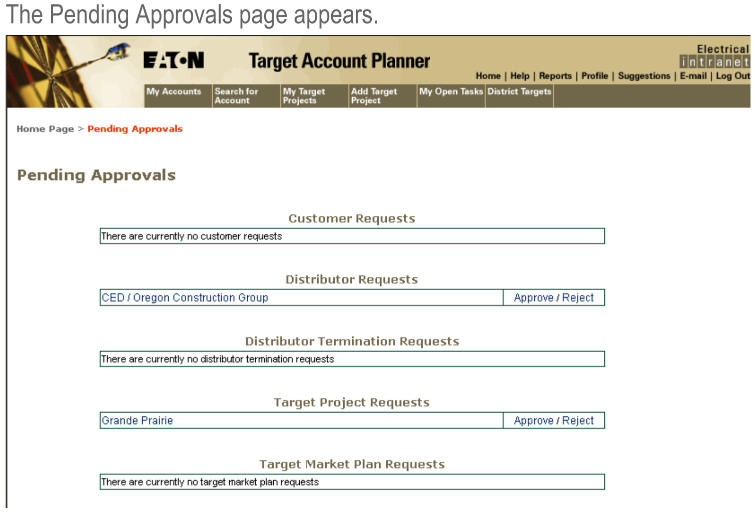
What Is The Pending Approvals Page?

The Pending Approvals page allows you to view on one page all approval requests that you have been asked to process.

To use the Pending Approvals page:

1. **From the home page, click the Requests for Approval link.**

   The Pending Approvals page appears.

2. **Do one of the following:**
   - **To view the approval page for a request, click a request name.**
   - **To approve a request, click the Approve link for a request.**
   - **To reject a request, click the Reject link for a request.**

WORKING WITH CRITICAL SUCCESS FACTORS

What are Critical Success Factors?

Critical success factors are set up by division managers as a way to better direct the sales efforts of our districts.

Note: You can only have four critical success factors for each district in effect at one time.

Critical success factors can be added or de-activated, but not changed. For example, if you want to assign an existing critical success factor to a new district, then you have to de-activate the existing critical success factor and create a new one, assigning the new district as you create it.

Also, critical success factors can have notes added to them to comment on the current status of meeting those factors. Notes can be added to critical success factors, but they can not be deleted or changed. When a note is added, Target Account Planner records who added the note and the date that it was added.

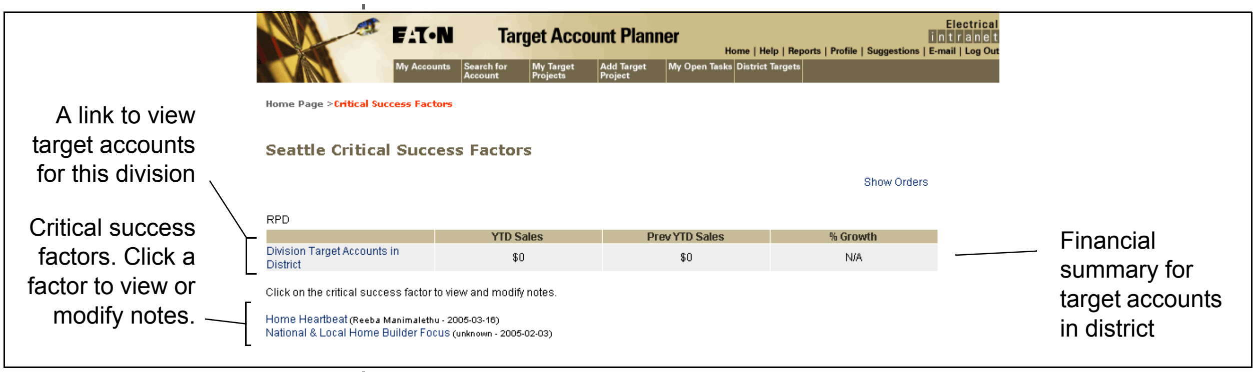
Viewing Critical Success Factors and Notes

To view critical success factors and notes:

For District Managers

- **From the home page, click the Critical Success Factors link.**

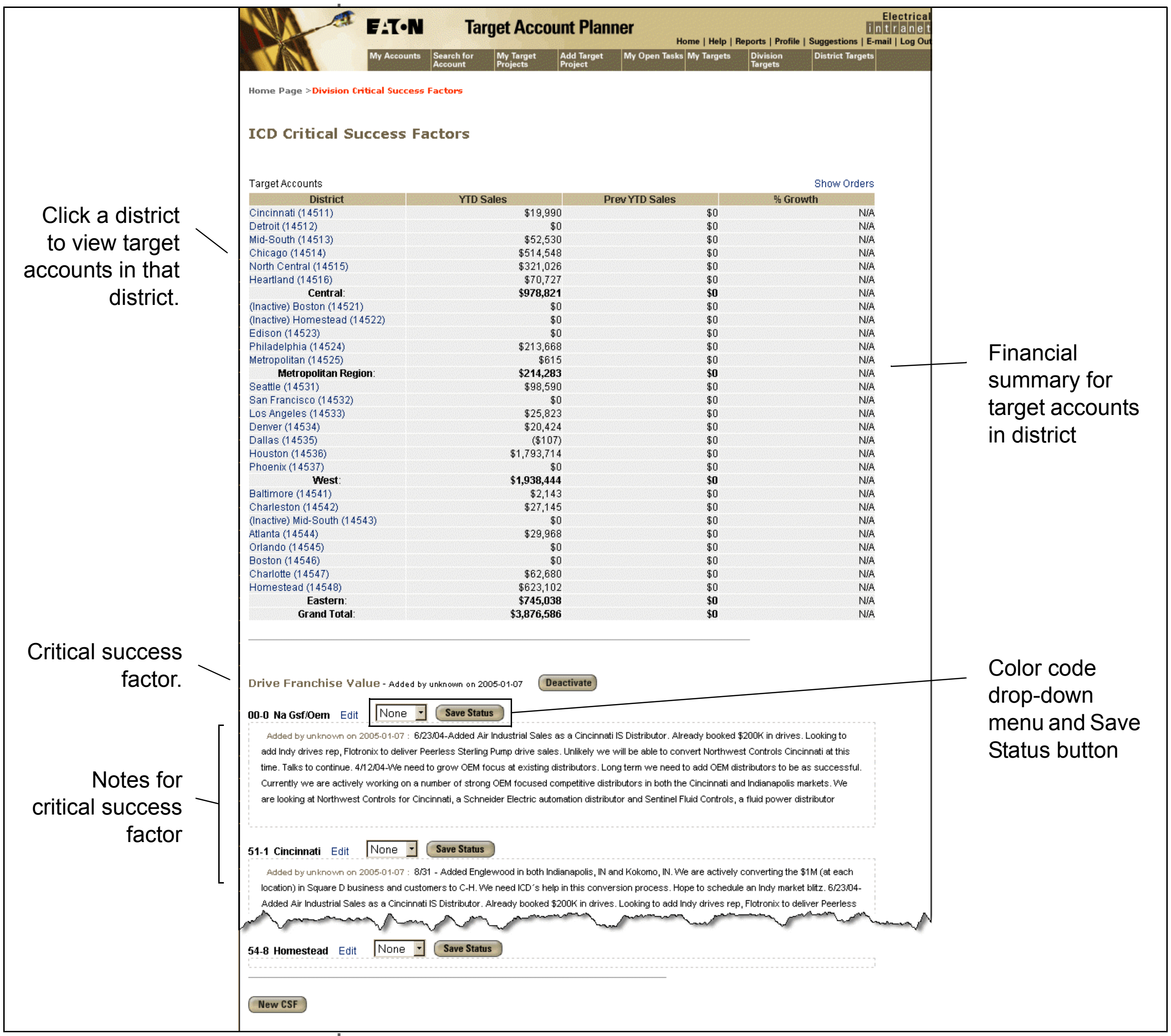
  A page appears, displaying critical success factors for your district.



For Division Managers

- **From the home page, click the View Critical Success Factors for Division drop-down menu and select a division.**

A page appears, displaying critical success factors and notes.



District	YTD Sales	Prev YTD Sales	% Growth
Cincinnati (14511)	$19,990	$0	N/A
Detroit (14512)	$0	$0	N/A
Mid-South (14513)	$52,530	$0	N/A
Chicago (14514)	$514,548	$0	N/A
North Central (14515)	$321,026	$0	N/A
Heartland (14516)	$70,727	$0	N/A
Central:	**$978,821**	**$0**	N/A
(Inactive) Boston (14521)	$0	$0	N/A
(Inactive) Homestead (14522)	$0	$0	N/A
Edison (14523)	$0	$0	N/A
Philadelphia (14524)	$213,668	$0	N/A
Metropolitan (14525)	$615	$0	N/A
Metropolitan Region:	**$214,283**	**$0**	N/A
Seattle (14531)	$98,590	$0	N/A
San Francisco (14532)	$0	$0	N/A
Los Angeles (14533)	$25,823	$0	N/A
Denver (14534)	$20,424	$0	N/A
Dallas (14535)	($107)	$0	N/A
Houston (14536)	$1,793,714	$0	N/A
Phoenix (14537)	$0	$0	N/A
West:	**$1,938,444**	**$0**	N/A
Baltimore (14541)	$2,143	$0	N/A
Charleston (14542)	$27,145	$0	N/A
(Inactive) Mid-South (14543)	$0	$0	N/A
Atlanta (14544)	$29,968	$0	N/A
Orlando (14545)	$0	$0	N/A
Boston (14546)	$0	$0	N/A
Charlotte (14547)	$62,680	$0	N/A
Homestead (14548)	$623,102	$0	N/A
Eastern:	**$745,038**	**$0**	N/A
Grand Total:	**$3,876,586**	**$0**	N/A

Modifying the Status Color of A District

On the division manager's Critical Success Factors page, a division manager can modify the color status of each district, indicating its progress in fulfilling a CSF.

To modify the status color of a district:

1. **On the Division Critical Success Factors page, scroll down to view a critical success factor and then scroll down to a district.**
2. **Click a color drop-down menu next to a district and select a color.**
3. **Click the Save Status button.**

   The color status of the district is saved.

Creating a Critical Success Factor

You can only create a critical success factor if you have permission in Target Account Planner. When you create a critical success factor, you will assign it to the applicable districts.

Note: You can only have four critical success factors for each district in effect at one time.

To create a critical success factor:

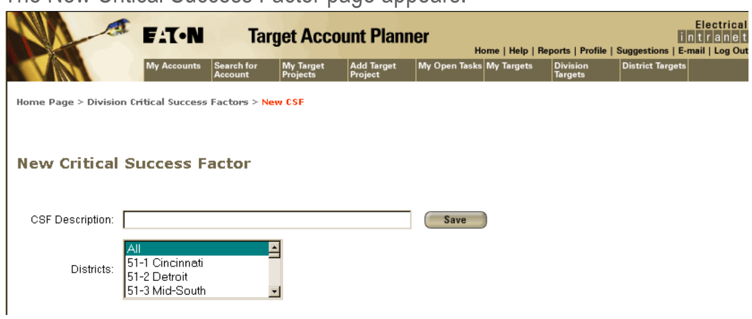
1. **From the home page, click the View Critical Success Factors for Division drop-down menu and select a division.**

   A page appears, displaying critical success factors and notes.

2. **At the very bottom of the page, click the New CSF button.**

Note: If you do not see the New CSF button, then you may already have the maximum number of critical success factors in effect.

   The New Critical Success Factor page appears.



3. **In the CSF Description field, type a statement of the critical success factor.**
4. **In the Districts field, select all districts to which the critical success factor applies.**

Note: You can select multiple districts by holding down the CTRL key while clicking districts.

5. **Click the Save button.**

   The critical success factor is added.

De-Activating a Critical Success Factor

You can only de-activate a critical success factor if you have permission in Target Account Planner.

To de-activate a critical success factor:

1. **From the home page, click the View Critical Success Factors for Division drop-down menu and select a division.**

   A page appears, displaying critical success factors and notes.

2. **Under a critical success factor, click the Deactivate button.**

   The adjacent critical success factor is de-activated.

Adding a Note to a Critical Success Factor

To add a note to a critical success factor:

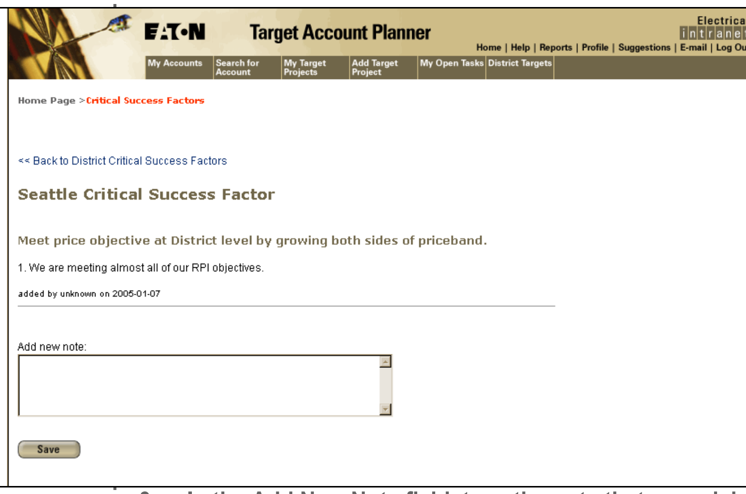
For District Managers

1. **From the home page, click the Critical Success Factors link.**

   A page appears, displaying critical success factors for your district.

2. **Click a critical success factor.**

   A page appears, displaying the critical success factor that you selected.



3. **In the Add New Note field, type the note that you wish to add.**
4. **Click the Save button.**

   The note is added.

For Division Managers

1. **From the home page, click the View Critical Success Factors for Division drop-down menu and select a division.**

   A page appears, displaying critical success factors and notes.

2. **Under a critical success factor, next to a city, click the Edit link.**

   A page appears, displaying the critical success factor and any related notes that have already been added.

3. **In the Add New Note field, type the note that you wish to add.**
4. **Click the Save button.**

   The note is added.

Setting Up New Customer Accounts

Overview of Customer Account Set Up

Target Account Planner is used to set up new customer accounts in Vista. Previously, there were screens in Vista that were used to set up customer accounts; these screens are no longer available. Target Account Planner is now the only tool for setting up customer accounts in Vista.

When setting up new accounts, you will be asked to classify the account in the following two ways:

- by how the customer purchases from Eaton, and
- by the markets to which the customer is associated.

Types of Customer Accounts

There are three types of customer accounts, based on how the customer purchases from Eaton, that can be added in Target Account Planner:

- **End Customer**. An end customer is a company, contractor, or other group that purchases Eaton products through a distributor. End customers do not receive invoices directly from Eaton and do not require any credit authorization during the setup process.
- **Direct Customer**. A direct customer is a company that buys Eaton products directly or through a distributor for their own use.
- **Distributor**. A distributor is a company that buys Eaton products for resale to an end customer.

What are Segments?

When you set up a customer account, you also classify customer accounts based on the customer's type of market. Target Account Planner does not use SIC codes to classify customers - instead it uses a more logical and limited classification system called *segments*.

Segments allow Eaton to cluster customers with common needs together and to identify the total potential available if we can better address these needs. Also, because customers will be more accurately defined for their markets, Eaton will be able to generate reports that focus on sales performance related to target industries.

Segment Classifications

Customers are classified into one of four main segments, one sub-segment, and then one or more lower-level segment classifications.

Main Segment > Sub-Segment > Lower-Level Segment(s)

The four main segments are:

- **End Customers**. The actual users of our products, such as industrial customers, hospitals, and water/wastewater customers.
- **Intermediary Customers**. Customers who serve as a link between us and the end users of our products, such as contractors and original equipment manufacturers.
- **Channel Customers**. Customers who purchase products from Eaton and then resell them to intermediaries and end customers, often out of stock. Examples include distributors and do-it-yourself accounts.
- **Other Influencers/Specifiers**. Customers who influence the purchase or specification of electrical products. Examples include architects and consulting engineers.

For definitions of all the segments and sub-segments, refer to *Detailed Segment Definitions* section on page 47.

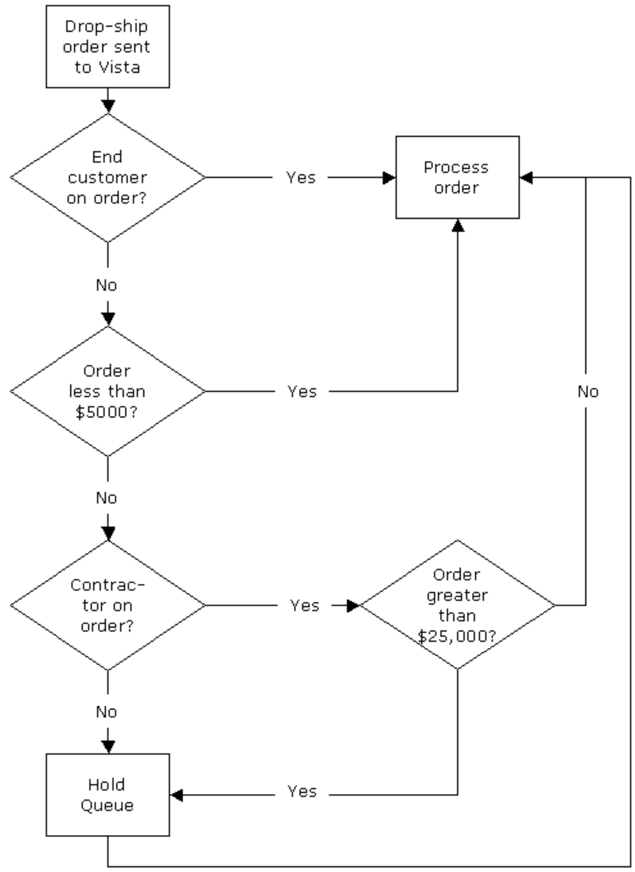
How Segments Affect Order Processing

The new segment types were created to help you more easily classify your customers, and therefore, more accurately complete your orders for sales credit. It is important that you understand and use the segment types correctly so that customers can be properly identified on your orders.

When an order is sent to Vista, Vista will ask the following questions about it in this order:

1. **Is an end customer identified on the order?**
   - **If yes, then the order will be processed.**
   - **If no, then the order will pass to the next question.**
2. **Is the total order amount less than $5,000?**
   - **If yes, then it will be processed even without an end customer identified.**
   - **If no, then the order will pass to the next question.**
3. **Is a contractor identified on the order?**
   - **If no, then the order is stored in a holding queue until an end customer is identified. The order can be processed, but no sales credit will be applied.**
   - **If yes, then the order will pass to the next question.**
4. **Is the total order amount greater than $25,000?**
   - **If yes, then the order is stored in a holding queue until an end customer is identified. The order can be processed, but no sales credit will be applied.**
   - **If no, then an end customer is not required and the order will be processed.**

The following diagram illustrates this order process:



The only orders that can be processed *without* end customer information are orders that either:

- Have an order amount that is less than $5,000
- Or, have a contractor listed and are less than $25,000.

Any other orders will *not* be processed until end customer information is identified.

However, an order that gets processed without end customer information or with incorrect end customer information will not show up in the expected reports in Target Account Planner and will not accurately represent market data for you, your team, or the organization.

SETTING UP A NEW ACCOUNT

How to Set Up a New Account

Setting up a customer account involves the following steps:

- **Collect customer account information**. For more information, see the *Collecting Customer Account Information* section on page 16.
- **Complete the account profile in Target Account Planner**. For more information, see the *Completing the Account Profile in Target Account Planner* section on page 16.

- **If the customer is a distributor, then complete the distributor application form**. For more information, see the *Completing the Distributor Application Form* section on page 20.
- **If the customer is a direct customer or a distributor, then complete the distributor credit application form**. For more information, see the *Completing the Distributor Credit Application Form* section on page 24.
- **If the customer is a distributor, then complete the impact analysis form, the product module request form, and the application summary form**. For more information, see the *Completing the Impact Analysis Form for Distributors* section on page 24, the *Completing the Product Module Request Form for Distributors* section on page 24, and the *Completing the Application Summary Form for Distributors* section on page 25.
- **Submit the account information for review**. For more information, see the *Sending the Account Information to Vista* section on page 25.

Collecting Customer Account Information

To help you gather the information that you need to set up a customer account, an Account Setup Information Worksheet is available. For more information, see the *Account Setup Information Worksheet* on page 53.

This worksheet lists in one place all the information that you may need to set up a customer account in Target Account Planner. The worksheet explains each item of information and provides space for you to write the information for your customer.

Note: Some of the customer information on this worksheet only pertains to specific customer types. Also, many fields in Target Account Planner allow you to browse for information that you may not know.

Completing the Account Profile in Target Account Planner

After you have collected the customer information that you need using the Account Setup Information Worksheet, you can enter the information in Target Account Planner.

Note: Fields preceded by a red asterisk (*) are required.

Completing the Customer Information

1. **Either:**
   - **If you are a sales engineer or a district manager, then, from the Home page, click the Add New Account link.**
   - **If you are a zone manager, a division manager, a global channel manager, or a credit manager, then, from the Home page, click a district or a segment to view a list of customers and then click the Add New Account link.**

   The Account Profile page appears.
2. **In the Customer Name field, type the customer name.**
3. **If the customer is owned by a parent company, then click the Parent Customer**

Browse button.

The Parent Browse page appears.

4. **In the Account Name field, type the Account Name and then click the Search button.**

Note: You can enter partial values to find all parent customers whose name begins with that value. For example, if you want to find all parent customers with a name that begins with "C," then you would type "C" in the Account Name field.

A list of matching accounts appears.

5. **Click an account name.**

The Account Profile page appears and the parent customer that you selected is displayed.

6. **Click the Lead Sales Engineer Browse button.**

The Sales Engineer Browse page appears.

7. **In the Sales Engineer's last name field, type the Sales Engineer's last name and then click the Search button.**

Note: You can enter partial values to find all Sales Engineers whose last name begins with that value. For example, if you want to find all sales engineers with a last name that begins with "C," then you would type "C" in the Sales Engineer's last name field.

A list of matching sales engineers appears.

8. **Click a Sales Engineer listing.**

The Account Profile page appears and the lead sales engineer is displayed.

Note: You can add up to three other sales engineers to an account using the respective Browse buttons for each additional sales engineer.

---

9. **Click the Segments Browse button.**

The Segment Browse page appears.

For information on how to choose segments for a new customer account, refer to *Segment Classifications* section on page 13.

10. **Click a checkbox next to a primary segment.**

A list of secondary segments appears.

11. **Click a checkbox next to a sub-segment.**

If applicable, a list of sub-segments appears.

12. **Click a checkbox next to each lower-level sub-segment that applies to your customer.**

Note: You can select multiple sub-segments.

For more information on segments, refer to the *Segment Classifications* section on page 13 or the *Detailed Segment Definitions* section on page 47.

13. **Click the Save button.**

    The Account Profile page appears, displaying the segments that you have selected.

Completing the Business Information

1. **In the Target Account field, select a group for whom your customer is a target account.**
2. **In the Options area, click the checkbox next to each of the following options that apply to your customer.**
    - **Direct**. If checked, this option will designate this account as a direct customer account. If you do not select this check box, the customer account will be added as an end customer and will not obtain the required review processes and A/R number needed for a billable customer.
    - **Exemption Certificate on File**. For direct customers and distributors, this option, if checked, indicates that we have the customer's tax exemption certificate on file.
    - **Order Confirmation Print**. For direct customers and distributors, this option, if checked, indicates that our systems should send order confirmations to the customer.
3. **In the Number of Employees field, type the number of employees of your customer.**
4. **Click the Application drop-down menu and select an application, if applicable.**
5. **Click the Focus Type drop-down menu and select a focus type.**
6. **In the Special Programs field, click any programs which apply to this account.**

Note: You can select multiple programs by holding down the CTRL key while clicking programs.

Entering the Business Address

1. **In the Line 1 field, type the street address.**

Note: You can enter more street address information using the Line 2, Line 3, and Line 4 fields.

---

2. **Click the City Locator Browse button.**

    The Zip Code Browse page appears.

3. **In the Zip Code field, type the zip code and then click the Search button.**

Note: You can enter partial values to find all zip codes that begin with that value. For example, if you want to find all zip codes that begin with "90," then you would type "90" in the Zip Code field.

A list of matching cities appears.

4. **Click a zip code listing.**

   The Account Profile page appears, displaying the city, state, and zip code that you selected.

5. **Complete the following fields:**

   - **Phone**.
   - **Fax**.
   - **Website**. Type the address for the customer's web site, if available.

Entering the Shipping and Bill-To Addresses

1. **Is the shipping address the same as the business address?**

   - **If yes, then, in the Shipping Address area, click the link to copy the business address to the shipping address fields and then proceed to the next step.**
   - **If no, then complete the Shipping Address fields in the same manner as the Business Address fields.**

   For more information on completing the address fields, refer to the *Completing the Business Information* section on page 18.

2. **Is the Bill-To address the same as the business address?**

   - **If yes, then, in the Bill-To Address area, click the link to copy the business address to the billing address fields and then proceed to the next step.**
   - **If no, then complete the Bill-To Address fields in the same manner as the Business Address fields.**

   For more information on completing the address fields, refer to the *Completing the Business Information* section on page 18.

Completing the Background and Cross-Reference Information

1. **In the Background Information field, type any general information or comments about the account.**

2. **Complete the following fields as applicable:**

   - **DPC-Num**. Type the WESCO DPC number for the customer. It is made up of two parts: the Wesco branch selling products to this customer and the branch’s customer number for this account.
   - **Synergy Code**. If the customer was acquired as a result of Eaton's acquisition of Powerware, then click the Synergy Code drop-down menu and select PWR. If the customer was acquired as a result of Eaton's joint venture with Caterpillar, then click the Synergy Code drop-down menu and select ISO.
   - **Store Number**. Type either the WESCO or DIY store number for the customer.
   - **Genesis Number**. Type the power generation customer cross-reference number.

Saving The Account Profile

- **Click the Save button.**

  The Account Profile page displays a “Save Successful” message and the customer status is updated to “Prospect.” Also, a Contacts section is added to the bottom of the Account Profile page allowing you to specify customer contacts. For more information, refer to the *Adding, Editing, or Deleting Contacts* section on page 29.

Completing Additional Forms

After you save the Account Profile page, additional links appear on the left side of the page. The links that appear depend on which type of account you are entering.

For all account types, the following links appear:

- **Account Profile:** Click this link to view the account profile information that you have completed for this customer.
- **Send to Vista:** Click this link to designate that the account is ready to be sent to Vista.

For a direct customer, the following additional link appears:

- **Distributor Credit Application:** Click this link to access the required credit application form for a direct customer. You must complete this form before you can send the account information to Vista.

For a distributor, the following additional links appear:

- **Distributor Application:** Click this link to access the required distributor application form. This form contains fields for tax, location, and segment information; as well as additional business details. You must complete this form before you can send the account information to Vista.
- **Distributor Credit Application:** Click this link to access the required distributor credit application form for a distributor. You must complete this form before you can send the account information to Vista.
- **Impact Analysis:** Click this link to access the impact analysis form for a distributor. This form is optional but recommended for a new distributor.
- **Product Module Request:** Click this link to access the required product module worksheet for a distributor. This form allows you to designate what products and pricing the distributor should have. You must complete this form before you can send the account information to Vista.
- **Application Summary:** Click this link to access the required application summary form for distributors. This form provides an overview of the distributor's key information. You must complete this form before you can send the account information to Vista.

Completing the Distributor Application Form

Before you can send a new distributor account to Vista, you must complete the required distributor forms. The first form is the Distributor Application form consists of five pages, or steps.

Note: Fields preceded by a red asterisk (*) are required.

Completing Step 1 of the Distributor Application Form

1. **Click the Distributor Application link on the Account Profile page.**

   The Distributor Signup form appears, displaying step 1 of 5.

2. **In the Federal Tax ID field, type the Tax ID for the distributor.**
3. **Click the Applying For drop-down box and select an option.**
4. **If necessary, complete the Previous Name of Company and Previous Vista Number fields.**
5. **Click the Form of Ownership drop-down box and select the form of ownership of the distributor.**
6. **If, for the form of ownership, you selected Subsidiary or Other, then, in the adjacent field, type either the parent company or the reason for other.**
7. **Click the Primary Business Activity drop-down list and select the primary business activity of the distributor.**
8. **Click the Save button.**
9. **At the top of the page, click the link for Step 2.**

   Page 2 of the Distributor Application form appears.

Completing Steps 2 and 3 of the Distributor Application Form

1. **From the Location Type drop-down list, select a location type.**
2. **In the Name of Chain field, type the name of the distributor.**
3. **In the Number of Branches field, type the number of branch locations.**
4. **In the Years at this location field, type the number of years at the distributor's current location.**
5. **In the Total Square Footage field, type the total square footage at the distributor's facility.**
6. **From the Facilities list, click the checkbox next to any facilities that exist at the distributor location.**
7. **From the Services list, click the checkbox next to any services available at the distributor's location.**
8. **From the Electronic Commerce list, click the checkbox next to any electronic commerce capabilities currently in use at the distributor location.**
9. **Click the Save button.**
10. **At the top of the page, click the link for Step 3.**

    Page 3 of the Distributor Application form appears.

11. **In the Personnel area, for each personnel type, enter the number of that type of personnel at the distributor location.**
12. **In the Key Management Personnel area, add any key management contacts.**

    For more information on adding contacts, refer to the *Adding, Editing, or Deleting Contacts* section on page 29.

13. **Click the Save button.**
14. **At the top of the page, click the link for Step 4.**

    Page 4 of the Distributor Application form appears.

Completing Step 4 of the Distributor Application Form

1. **In the Customer Segments fields, type the percentage of sales the distributor sells to the customer segments listed in the respective fields.**

Note: The total for all percentage fields must equal 100%.

---

2. **In the Product/Sales fields, for each type of product, enter the following information in the respective fields:**
   - **Total Sales**. The total sales of the product line at the distributor location.
   - **% Sold Through Stock**. The percentage of the total sales figures that the distributor sells from its stock.
   - **Manufacturer Name Current**. The primary, secondary, and other (if applicable) manufacturers the distributor represents for the product line.
   - **Manufacturer Name Proposed**. The primary, secondary, and other (if applicable) manufacturers the distributor may represent in the future for the product line.
3. **In the Market Coverage fields, click a drop-down box to select a County and State and then, in the adjacent % Sold Into Each County field, type the percentage of the distributor's stock that is sold to the selected area.**

Note: The total for all percentage fields must equal 100%.

---

4. **Add key customers.**

   For more information, see the *Adding Key Customers to the Distributor Application* section on page 22.
5. **Click the Save button.**
6. **At the top of the page, click the link for Step 5.**

   Page 5 of the Distributor Application form appears.

Adding Key Customers to the Distributor Application

To add a key customer:

1. **On Step 4 of the Distributor Application form, at the bottom of the page, click the Choose Accounts link.**

   The Account Browse page appears.
2. **Either:**
   - **In the Account Name field, type the name of the key customer.**
   - **Or, in the Vista Number field, type the Vista number of the key customer.**

Note: You can enter partial values to find all account names or Vista numbers that begin with that value.

---

3. **Click the Search button.**

   A list of matching customers appears.

4. **Click a customer name.**

   Step 4 of the distributor application form refreshes, displaying the key customer that you selected.

5. **In the Product Opportunities field next to the key customer name, click the product lines that the distributor sells to that customer.**

Note: You can select multiple product lines by holding down the CTRL key while clicking product lines.

---

6. **In the adjacent Potential Eaton $ field, type the potential sales of Eaton products the distributor could sell to the key customer.**
7. **Click the Save button.**

Note: You can remove a key customer by clicking the checkbox to the left of the customer listing and then clicking the Save button. When the page refreshes, the key customer you selected will be deleted.

Completing Step 5 of the Distributor Application Form

1. **In the Top 5 Suppliers area, in the Supplier Name column, click the drop-down menus and select top five suppliers for the distributor.**

Note: If a top supplier is not available from the drop-down menus, then click the E-Mail link in the upper right area of the page. Use the e-mail message that appears to request that the Target Account Planner administrator add the supplier to Step 5 of the Distributor Application form.

---

2. **For each supplier in the Supplier Name column, in the Product column, click the drop-down menus to select the product type that the supplier provides.**
3. **Complete the following fields:**
   - **Current Year Total Sales Estimate**. Type an estimate of this distributor's current year sales.
   - **Previous Year Total Sales**. Type the distributor's previous year sales.
   - **Year Before Last Total Sales**. Type the distributor's sales from two years ago.
   - **Approximate Inventory At This Location**. Type an approximate cost of the inventory at the distributor location.
   - **Projected Eaton Sales**. Type an estimate of potential sales for Eaton products for both this year and the third year.
4. **Click the Participates in NAED drop-down menu and select the option that applies to this distributor.**
5. **In the Buying Group Association area, click all checkboxes that apply.**
6. **In the List Other Trade Associations field, type any trade associations to which the distributor belongs.**
7. **In the Other Notes or Comments field, type any necessary notes.**
8. **Click the Save button.**

Completing the Distributor Credit Application Form

The Distributor Credit Application form is required if a customer is billable. A credit check will occur as part of the review process.

Note: Fields preceded by a red asterisk (*) are required.

1. **On the left side of the page, click the Distributor Credit Application link.**

   The Distributor Credit Application page appears.

2. **In the Bank Affiliation Name field, type the customer's current bank.**
3. **In the Trade Reference section, type the following information for at least one trade reference:**
   - **Name**
   - **Address**
   - **Phone number**
   - **Fax number**
4. **Send a copy of the customer's Sales Tax Exemption Certificate according to the instructions displayed on the page.**
5. **Click the Save button.**

   The Distributor Credit Application page appears and is updated with the new credit information.

Completing the Impact Analysis Form for Distributors

The Impact Analysis form is not required but is recommended for new distributors.

Note: Fields preceded by a red asterisk (*) are required.

1. **On the left side of the page, click the Impact Analysis link.**

   The Distributor Impact Analysis page appears.

2. **In the fields listed, type the applicable dollar values.**
3. **Click the Save button.**

   The Impact Analysis page is updated with the total impact dollars.

Completing the Product Module Request Form for Distributors

The Product Module Request form allows you to mark the product modules and pricing that you want this distributor to have.

1. **On the left side of the page, click the Product Module Request link.**

   The Product Module Request page appears.

2. **Click the checkboxes along the top of the table to select any product modules this distributor should have.**
3. **Click the Save button.**

Completing the Application Summary Form for Distributors

The Application Summary form is an overview of the distributor's key information for district managers, zone managers, and channel marketing personnel. This form collects information that is not collected on the other forms. In order to provide all required distributor data, you must complete this form.

Note: Fields preceded by a red asterisk (*) are required.

1. **On the left side of the page, click the Application Summary link.**

   The Application Summary page appears.

2. **In the Commitment Level area, click the option that best applies.**
3. **If applicable, in the Exclusive commitment field, type the date the applicable commitment became effective.**
4. **In the Projected Total Eaton Sales fields, type the projected sales for Eaton products for the first and third years.**
5. **In the Estimated % Breakdown of Sales fields, type the applicable information.**
6. **In the Distributors Impacted area, for each distributor that is affected, click the Add Distributor To List link.**

   The Account Browse page appears.

7. **In the Account Name or Vista Number field, type either the Account Name or Vista Number and then click the Search button.**

Note: You can enter partial values to find all accounts whose name begins with that value. For example, if you want to find all accounts with a name that begins with "C," then you would type "C" in the Account Name field.

   A list of matching accounts appears.

8. **Click an account name.**

   The Application Summary page refreshes and the account that you selected is displayed.

9. **For each distributor that you have added, in the Eaton Sales at Risk column, type the estimated sales impact to that distributor.**
10. **In the Net Area Impact fields, type the total estimated net gain or loss in the first and second years.**
11. **Click the Customer Category drop-down menu and then select an applicable category.**
12. **Click the Save button.**

Sending the Account Information to Vista

1. **On the Account Profile page, click the Send to Vista link.**

   The Workflow - Customer page appears and displays any errors that you may currently have with your new customer account.

   - If errors are detected, click the Account Profile link to make changes. After making corrections, click the Save button and then click the Send to Vista link again to determine if all errors are resolved.

- If no errors are detected, a message appears saying "This account will be Sent to Vista" at the top of the page and an Approve link will appear under the Action column.

2. **On the Workflow-Distributor page, click the Approve link under the Action column.**

   A Registering the account in Vista… message appears until the set up process is complete.

   When process is completed successfully, a Workflow Approval Success message appears, and the Workflow-Customer page is updated to display the district, Vista Customer Number (Vista ID), and reference number. In addition, the customer status in Target Account Planner is updated to "Active." The reference number is used to track the request in Vista; it can be helpful if errors are detected during the setup process.

   If a duplicate end customer is found in Vista or an error is detected, you will be notified via e-mail and in Target Account Planner. The notification will include the reference number for easy tracking and maintenance. The request will not proceed to the next step in the setup process until the errors are resolved in Vista.

Entering Direct Customer Orders During The Review Process

While a direct customer request is going through the set up process, the customer's orders may still be entered. However, until the customer has passed the credit review process, the orders will have a status of "T" for treasury hold, meaning that the orders are awaiting approval to be processed. After the customer's credit request is approved and a Vista ID is issued, then the orders for that customer will be processed; and after the customer is assigned an accounts receivable (A/R) number, the customer can then be invoiced for its orders.

The Direct Customer Review Process

Direct customers have a two-step review process before a Vista ID and A/R number can be generated. A Vista ID is required for the customer to enter and process orders. A Vista A/R Number is required for all billable customers (direct customers and distributors) in order to generate invoices.

Step 1: First Review. Customer Financial Systems (CFS) reviews the customer account in Vista and decides whether to reject or approve the customer.

If your customer request is rejected, you will be notified via e-mail and in Target Account Planner. You must resolve the error in Vista and submit the request again.

Step 2: Credit Approval Review. Eaton's electrical division credit department reviews the customer account in Vista to determine credit limits. The credit department can then decide whether to give credit approval. If approved, they will specify credit limits and assign a treasury analyst to the customer. The A/R number will be automatically generated and assigned to the account. You will not need to contact the Credit Department.

If the customer request is rejected, you and the first reviewer will be notified via e-mail and in Target Account Planner. You can review the rejection notification, but cannot resolve the error. The first reviewer will have to resolve errors in Vista.

The Distributor Review Process

After you click the Approve link, the distributor information is sent through a review process designed to ensure that all relevant parties have an opportunity to review distributor information before it is sent to Vista for processing. The distributor will not be sent to Vista until the final review step is completed and approved. The status of the distributor review is tracked on the Workflow-Distributor page.

Note: If any person in the workflow review process decides to reject the distributor using the Reject link, the district manager that is assigned will be notified.

Step 1: District Manager Approval. Distributor accounts can be set up by sales engineers but are often set up by a district manager. After all of the required forms are completed, the district manager has to approve the account in Target Account Planner to send it to the next step in the review process.

Step 2 or 3: Credit Approval. Eaton's electrical division credit department reviews the customer account in Vista to determine credit limits. The credit department can then decide whether to give credit approval. If approved, they will specify credit limits and assign a treasury analyst to the customer.

Step 2 or 3: Zone Manager Approval. The Zone Manager reviews all data and forms submitted for the distributor in order to recommend distributor authorization.

Step 4: Channel Approval. Reviews all data and forms, checks with the credit department, and conferences with zone and district managers as required to authorize a distributor. If approved, they can send the distributor data to Vista for processing.

When the workflow review process within Target Account Planner is completed and the distributor has been approved, the Global Channel Manager can send the account to Vista for processing.

Working With Account Information

Finding An Account Using the Customer Search Page

To find a customer account using the customer search page:

1. **On the home page, click the Search for Account tab.**

   The Customer Search page appears.

2. **Complete any of the following fields to search for information using that field:**

   - **Customer Name**. You can enter partial values in this field.

- **Vista Customer Number**. You can enter partial values in this field.
- **Parents Only**. Clicking this checkbox filters your results to display only parent customer accounts.
- **Sales Engineer: Last / First**. You can enter partial values for the sales engineer's first or last name in these fields.
- **State**.
- **District**.
- **Potential Customers Only**. Clicking this checkbox filters your results to display only potential customer accounts.

3. **Click the Search button.**

   The Customer Listing page appears.

4. **Click an account name.**

   The Account Profile page for the account that you selected appears.

EDITING ACCOUNT INFORMATION

Overview of Editing Customer Account Information

Customer account profile information is either stored in Target Account Planner or in Vista, depending on the customer status and the type of information.

Table 3: Where Customer Account Information Is Stored

Account Status	Where Customer Account Information Is Stored
Prospect (The account has not yet been sent to Vista.)	All account information is stored in Target Account Planner and you can access and modify the data in Target Account Planner.
Active (The account has been sent and processed in Vista.)	Most of the data is stored in Vista and can only be accessed in Vista. There are a few fields, however, that are still accessible for editing in Target Account Planner.

Note: You will only be able to edit account information in Target Account Planner and Vista if you have full access to the account based on your district.

Editing Customer Accounts in Target Account Planner

If you have not sent the customer account to Vista for processing, you can edit all the account information in Target Account Planner at any time.

If you have already sent the customer account to Vista for processing, you can only edit the following fields in Target Account Planner:

- **Segments**. You can modify segment information with the following exceptions:
  - The Channel segment cannot be altered.

- The Contractor sub-segment for Intermediary Customers cannot be altered.

Note: These segments cannot be altered because they require special processing in Vista once the account is created. To modify this segment data, you must use Vista.

- **Target Account Status**.
- **Contacts**.
- **Application**.
- **Focus Type.**
- **Number of Employees**.
- **Background Information**.

To edit a customer account in Target Account Planner:

1. **View the account's Account Profile page.**

   For more information, see the *Completing the Account Profile in Target Account Planner* section on page 16.

2. **Make any necessary changes.**
3. **At the bottom of the Account Profile page, click the Save button.**

   The Account Profile changes are saved.

Editing Customer Accounts in Vista

If you have already sent the customer account to Vista for processing, all significant maintenance for that customer account must take place in Vista, including:

- Resolving rejection notifications and errors generated when Vista detects duplicates or errors or during the credit review process for direct customers. To resolve customer rejection notifications, you use the Customer Setup Reject Maintenance screen (CUS SET SRM).
- Updating and maintaining most customer information, including change of address, sales engineer, and segment information for either the Channel segment or the Contractor sub-segment of the Intermediary segment. To update and maintain customer information after the customer as been assigned a Vista ID, you use the Customer Maintenance screen (CUS MNT CMN).

Adding, Editing, or Deleting Contacts

To add, edit, or delete contacts:

1. **From the Account Profile page, in the Contacts area, click the Add Contact button.**

   The Add Contact window appears.

2. **Complete the following fields:**
   - **First Name**
   - **Last Name**
   - **Job Title**

3. **Click the Functional Position drop-down menu and then select a position.**
4. **Complete the following fields:**
   - **Phone Number.**
   - **Fax Number.**
   - **Email Address.**
   - **Comments.**
   - **Pricing Contact**. Check this checkbox only if the contact is a pricing contact.
5. **Click the Save button.**

   The Account Profile page refreshes and the contact is listed.

Note: You can edit the contact using the pencil icon or delete the contact using the trash can icon.

---

6. **At the bottom of the Account Profile page, click the Save button.**

   The Account Profile is updated.

Associating Yourself to a Customer Account

Being associated to a customer account is a way for you to keep informed about activities related to that account.

To associate yourself to an account:

- **From the Account Profile page, in the Business Information area, click the Associate Yourself to This Account link.**

  A new window appears, displaying all associated users, including yourself.

Removing Your Association To An Account

To remove your association to an account:

1. **From the Account Profile page, in the Business Information area, click the Users Associated to This Account link.**

   A new window appears, displaying all associated users.
2. **Click the Remove Your Association to This Account link.**

   The page refreshes and your name is removed from the list of associated users.

EDITING SALES PLANS

What is a Sales Plan?

Every customer account in Target Account Planner has one and only one sales plan. A sales plan consists of the following types of information:

- **Customer name and the lead salesperson**.
- **Stage of the account**. This section identifies the status of the account. Valid statuses include: non-target, active, on hold, existing account, or lost.
- **Objectives and strategies**. This section lists objectives and strategies that are measurable, are attainable, and have a time focus. When adding or changing this information, you should include enough information for any-

one reading it to be able to easily understand your intentions, including information such as our strategic focus, desired position, and short/long term objectives.

- **Competitive products and position**. This section describes any competitor products that the account purchases or may purchase, those products' strengths and weaknesses, and what we expect they will do to defend their position.
- **Task assignments**. This section displays a listing of tasks that are intended to accomplish the sales objectives for the account and for which sales personnel have been given responsibility.

Modifying a Sales Plan

To modify a customer account's sales plan:

1. **On the Account Profile page, click the Sales Plan tab.**

   The account's sales plan appears. This page is for viewing only.

2. **Click the Update Plan button.**

   The Sales Plan - Update page for the sales plan appears.

3. **Click the Stage of the Account drop-down box and select a stage.**
4. **Complete the following fields:**
   - **Objectives and Strategies**
   - **Competitive Products and Position**

   For information on creating and modifying tasks, refer to the *Creating or Modifying a Task* section on page 32.

5. **Click the Save button.**

   The page reloads with the message "Save Successful" appearing at the top.

6. **Click the Click Here to View Plan link.**

   The Sales Plan page appears, displaying your modifications.

WORKING WITH TASKS AND LOGGING CUSTOMER VISITS

What are Tasks?

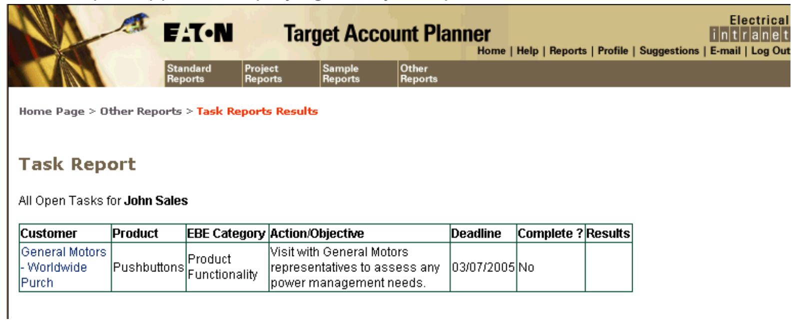
Tasks are the actions that the sales organization takes to achieve the objectives on the sales plan for a customer account. When you are assigned a task, you will receive an e-mail message that states the task and also states the account and the product line to which the task is associated.

Viewing Your Open Tasks

To quickly view any incomplete tasks for which you have been assigned:

- **On the home page of Target Account Planner, click the My Open Tasks tab.**

A task report appears, displaying all of your open tasks.



Creating or Modifying a Task

Before you can create a task, you must first view the sales plan for an account. When you create a task, the person whom you assigned it to is notified by an e-mail message.

To create a task:

1. **From the Account Profile page, click the Sales Plan tab and then click the Update Plan button.**

   The Sales Plan - Update page appears.

2. **In the Task Assignment area, in the first blank row, in the Action field, type a description of the task.**

Note: When you write actions, remember to provide as much information as necessary to be sure that the intended recipient understands what actions are required to complete the task. It may be helpful to state the results you want to see as well as the methods you want the person to use to achieve them.

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3. **Click the Assign To drop-down menu and select a person responsible for completing the task.**

Tip: If you want the task sent to someone in addition to the assigned recipient, click the Carbon Copy drop-down menu and select a person.

---

4. **Click the Product Line drop-down menu and select a product line.**
5. **Click the EBE Category drop-down menu and select a category.**
6. **Click the calendar icon.**

   A new window appears, displaying a representation of a calendar.

7. **Click the drop-down menus at the top of the new window to specify the month and year of the task's due date.**
8. **Click a button for the day of the task's due date.**

   The window closes and the date that you selected appears in the Schedule field.

9. **Click the Save button.**

   Your task is created.

Note: To modify an existing task, you follow this same procedure except, instead of starting on a blank row, you would change the information in the fields of the existing task.

Completing a Task

To complete a task:

1. **From the Target Account Planner home page, click the My Open Tasks link.**

   A list of your open tasks appears.

2. **Under the Customer column, click an account name.**

   The Sales Plan - Update page appears.

3. **Click the Done checkbox next to a task.**
4. **In the adjacent Results field, type a description of the results of the task.**
5. **Click the Save Changes button.**

   Your task is completed.

Logging a Customer Visit

Note: When logging a customer visit, you can edit the details of the visit within ten days after it is first saved. After ten days, you can no longer edit the information for that visit.

Note: Fields preceded by a red asterisk (*) are required.

To log a customer visit:

1. **View the Account Profile page for the customer that was visited.**

   For more information, see the *Finding An Account Using the Customer Search Page* section on page 27.

2. **At the top of the page, click the Log Visits tab.**

   The Log Customer Visits page appears.

3. **In the General Description field, type a brief description of the visit.**
4. **In the Customer Employees Present area, either:**
   - **Click an employee that was present at the visit.**

Note: You can select multiple contacts by holding down the CTRL key as you click contact names.

   - **Click the Add New button to add a new contact.**

   For more information, see the *Adding, Editing, or Deleting Contacts* section on page 29.

5. **In the Eaton Employees Present area, click an employee that was present at the visit.**

Note: You can select multiple Eaton employees by holding down the CTRL key as you click employee names.

6. **Complete the following as applicable:**
   - The **Date of Visit** field.
   - The **Reason for Visit** drop-down menu.
   - The **Outcome of Visit** drop-down menu.
   - The **Date of Next Visit** drop-down menu.
   - The **Notes** field.
7. **Click the Save button.**

   The visit is logged.

WORKING WITH SALES DATA AND PROJECT SAMPLE REQUESTS

Modifying an Account's Product Potential Mix

The Product Potential Mix page lists the following sales information for the account for each Eaton electrical product line: current year total, previous year's year-to-date total, previous year's total, two years ago total, the potential dollars, the forecasted dollars, dollars spent on competitor products, and other comments.

You have the option of exporting the information on the Product Potential Mix page to a Microsoft Excel file.

To modify an account's product potential mix:

1. **On the Account Profile page, click the Product Potential Mix tab at the top of the page.**

   The Product Potential Mix page appears.
2. **For each product line for which you want to add sales figures, complete the following:**
   - The **Potential** field using the potential dollars for each product line for the account, as estimated by the salesperson.
   - The **Forecast** field using the forecasted dollars for each product line for the account, as estimated by the salesperson.
   - The **Competitor** drop-down menus. Enter the dollars spent with the competitor selected in the field below.
   - In the **Competitor / Comments** column, type any comments about the competitor information that you entered.
3. **Click the Save button.**

   The changes that you have made are saved.

Tip: To export the information on the Product Potential Mix page to a Microsoft Excel file, click the Export to Excel link at the top of the table.

Requesting a Product Sample

To request a product sample:

1. **At the top of the Account Profile page, click the Sample Request tab.**

   The Product Sample Request Form appears.

2. **In the first text field, type the reason for the request.**
3. **For the customer contact, either:**
   - **Click the contact drop-down menu and select a contact.**
   - **Or, add a new contact.**

   For more information on adding contacts, refer to the *Adding, Editing, or Deleting Contacts* section on page 29.

4. **For each product sample requested, complete one of the Qty and Catalog Num fields.**
5. **Click the Ship To drop-down box and select an option.**
6. **Complete the following fields as necessary:**
   - **Attention**. Type the contact's name.
   - **Address** (1, 2, and 3).
   - **City**, **State**, and **Zip**.
7. **In the Ship By area, click an option.**
8. **If "Air" was selected in the Ship By area, then, in the Carrier and Account Number field, type the carrier account number.**
9. **Click the Place Request button.**

   A message appears stating that your request has been processed.

WORKING WITH TARGET PROJECTS

What is a Target Project?

A project that is recognized as a key project for either the field or the divisions is called a target project. Target projects can receive more resources, efforts, and potentially more competitive pricing. A sales engineer should discuss any potential project with his or her district manager to determine the guidelines for target projects.

The Approval Process

There are four key roles in approving a target project. The four roles are:

- **Requestor**: The requestor completes the New Target Project page in Target Account Planner.
- **District Manager**: The district manager is the first person to approve the target project.
- **Project Sales Manager for the District**: Theproject sales manager for the district is the second person to approve the target project.
- **CHAMPS Manager**: The CHAMPS manager is the final person to approve the target project. A project cannot become active without the approval of the CHAMPS manager.

The process for approving a target project is as follows:

- Step 1: The requestor completes the Add a Target Project page in Target Account Planner.
- Step 2: Target Account Planner sends an e-mail message to the requestor, the district manager, and anyone else assigned to the project, stating that the district manager must approve the request before the Target Project can proceed in the approval process.
- Step 3: The district manager approves or deletes the target project request from the Pending Approvals page in Target Account Planner.
- Step 4: If the district manager approves the request, then Target Account Planner sends an e-mail message to the requestor, the project sales manager for the district, the district manager, and anyone else assigned to the project, stating that the project sales manager for the district must approve the request before the Target Project can proceed in the approval process.
- Step 5: The project sales manager for the district approves or deletes the target project request from the Pending Approvals page in Target Account Planner.
- Step 6: If the project sales manager for the district approves the request, then Target Account Planner sends an e-mail message to the requestor, the CHAMPS manager, the project sales manager for the district, the district manager, and anyone else assigned to the project, stating that the CHAMPS manager must approve the request before the Target Project can become active.
- Step 7: The CHAMPS manager approves or deletes the target project request from the Pending Approvals page in Target Account Planner.
- Step 8: If the CHAMPS manager approves the request, then the Target Project is approved and becomes active in Target Account Planner.

Adding a Target Project

To add a target project:

1. **On the Home page, click the Add Target Project tab.**

   The New Target Project page appears.

2. **Complete the following fields:**

   - **District**.
   - **Job Name**. Use the same job name that you used for the negotiation in Bid Manager.
   - **Consultant**. If you do not know the Vista customer number, you can enter a consultant's name.
   - **Bill of Material**. This field is for the product lines that are of interest to the customer.

Note: You can select multiple options by holding down the CTRL key as you click options.

   - **Bidding G.C.** Type the general contractors that are bidding on this job.

- **EG Value**. Type the potential amount that the Eaton could gain from this project.
- **Total Value**. Type the amount that the entire job is worth.
- **Bid Date**.
- **Change Order Potential**. Click the drop-down menu and select rating to gauge the interest in using our products.
- **EG Position with Contractor**. Type the view the general contractors have toward Eaton products.
- **Specified Vendors**.

Note: You can select multiple options by holding down the CTRL key as you click options.

- **Neg Number**. Type the negotiation number that was created with the job in Bid Manager.

3. **In the Project Status area, click the Bid Manager project status as found in the marketing information for the negotiation.**
4. **In the Strategic Reason area, click a reason this project should be a target project.**
5. **In the Spec Preferences for EG area, select option describing the contractor's preferences for Eaton products for this project.**
6. **Type the Vista ID(s) for any distributors, electric contractors, and end customers in the corresponding fields.**

Note: Do not select Team Members for the Project until after the project has been approved. If you select team members prior to approval, they will receive a copy of every auto-generated e-mail message during the approval process about the pending target project.

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7. **Click the Save Changes button.**

Approving or Rejecting a Target Project

Only district managers, project sales managers for the district, and CHAMPS managers have permission to approve target project requests. After a target project has been submitted for approval, you will receive an e-mail message from Target Account Planner when you need to take action on the request.

Note: After a target project has been rejected, it cannot be re-submitted. The entire target project request will need to be entered again. Do not reject a target project that needs editing. Communicate with the requestor if the project needs to be edited before you can approve it.

To approve or reject a target project:

1. **On the Home page, click the Pending Approvals link.**

   The Pending Approvals page appears.

2. **Approve or reject a target project.**

For more information, see the *What Is The Pending Approvals Page?* section on page 8. For more information about the fields, refer to the *Adding a Target Project* section on page 36.

Editing a Target Project and Adding Team Members

To edit a target project or add team members:

1. **On the Home page, click the My Target Projects tab.**

   The My Target Projects page appears.

2. **In the Active Projects area, click a project name.**

   The New Target Projects page appears in edit mode.

3. **In the Team Members for the Project area, select any team members.**

Note: You can select multiple options by holding down the CTRL key as you click options.

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4. **Click the Save Changes button.**

   The “Your changes were saved successfully” message appears.

Deleting a Target Project

To delete a target project:

1. **On the Home page, click the My Target Projects tab.**

   The My Target Projects page appears.

2. **In the Active Projects area, click the red X button adjacent to a project name.**

   The project you selected appears in the Deleted Projects area.

Note: After a target project has been deleted or rejected, it cannot be re-submitted. If you decide to reactivate this project, you will need to enter it again and send it through the approval process.

Working With Reports

Types of Reports

There are eight different reports that can be found under the four report tabs in Target Account Planner. Each report can be customized and provides you with detailed information about your accounts.

Table 4: Types of Reports Available in Target Account Planner

Report Tab	Report Name	Description	Data Source(s)
Standard Reports	Standard Report	Shows any combination of the following data: • End Market Sales Dollars • End Market Order Dollars • Charge To Sales Dollars • Charge To Order Dollars • Potential Dollars • Forecast Dollars • Competitor Dollars You are able to view the data in a variety of ways and also have the ability to filter the data by product, date, geography, and more.	End-market and charge-to data comes directly from Vista orders and invoices. Potential, forecast, and competitor data comes from the customer account information that is entered into Target Account Planner by each user.
Project Reports	Target Project Report	Produces a report of target projects, including their status, bid date, and value.	Data comes from the target project information that is entered into Target Account Planner by each user.
Project Reports	Bid Tracking Report	Produces a custom summary report based on criteria that you select of bids and bid dollars that were created and obtained in Bid Manager. It also gives you the ability to see the detail of the summary report. This report is intended to provide a general view of status and may not be an exact representation of all of the negotiations in Bid Manager. You will need to create a report from within Bid Manager to get a more accurate status of your negotiations.	Data comes from the Bid Tracking database. The Bid Tracking database collects information from the report alternate of every negotiation in Bid Manager. Note: The report alternate defaults to 0000 and can be changed from the marketing information in Bid Manager. Any negotiation information that is stored in alternates other than the report alternate is not reported.
Sample Reports	Sample Report	Produces a report of customers and the samples that were sent to them.	Data comes from the Product Sample Request information that is entered into Target Account Planner by each user. Note: Samples that were ordered without using Target Account Planner will not be included in this report.

Table 4: Types of Reports Available in Target Account Planner (Continued)

Report Tab	Report Name	Description	Data Source(s)
Other Reports	Task Report	Produces a report of tasks that have been created in the customer sales plans. Note: The default report shows only tasks that are not complete. You can also choose to report on completed tasks.	Data comes from the task information entered into customer sales plans in Target Account Planner by each user.
Other Reports	Target Market Report	Produces a report of target market plan information. The target market program is intended to promote growth with our distributors. When a distributor is enrolled in the target market program, they are eligible to receive a payment from the Eaton based on incremental sales. The money comes from the divisions involved in that particular program. Only distributors would be tracked using this tool, even though other types of customers are eligible to be enrolled. Note: This report is not available to sales engineers.	Data comes from the information entered into the Target Market page within a customer account in Target Account Planner. Target Market Plans are only available for distributor accounts.
Other Reports	Customer Visit Report	Produces a report of customer visits, including who performed the visit, when, and why.	Data comes from the information entered into the Log Visits page within a customer account in Target Account Planner.
Other Reports	Usage Report	Produces a report of the number of times Target Account Planner has been accessed by month.	Data comes from the Target Account Planner application.

Creating a Standard Report

For a standard report, the information you can view is based on your sales reporting security level. Remember that sales and order dollar information comes directly from Vista. Potential, forecast, and competitor dollar information comes from the customer account information entered into Target Account Planner by each user. For accurate reports, make sure that you keep this information up-to-date on all of your accounts.

To create a standard report:

1. **On the Home page, click the Reports link.**

   The report area page appears with the Standard Reports tab active.

2. **In the left column, click the drop-down menu and select a month and year.**
3. **In the End Market and Charge To areas, click either sales or orders.**
4. **In the End Market and Charge To areas, click the checkbox next to any of the following fields as applicable:**

- Monthly $
- YTD for Month
- Previous Year YTD
- Previous Year Total
- Prev Year's Monthly $

5. Click any of the following checkboxes as applicable:
   - Potential Dollars
   - Forecast Dollars
   - Competitor Dollars
6. In the Results Grouped row, click one or more options.
7. In the Filter Results row, click any of the following criteria to show only matching results:
   - Focus Types / Account Coverage
   - Application
   - Product
   - Geography
   - Segments
   - Special Programs
   - Target Accounts Only

Note: You can select multiple options by holding down the CTRL key as you click options.

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8. Click the Submit button.

   The Standard Report Results page appears.

Working with Report Results

After you run a Standard Report, you have a variety of options. You have the ability to sort the data, drill down into the details of the data, export the data to Microsoft Excel, show the data graphically, send a message to the associated users, and gather contact information.

Table 5: Features of Report Results Pages

Click this…	To do this…
Microsoft Excel icon	To open or save the report results in Microsoft Excel. If you select Open, you can view the report results in Microsoft Excel. If you select Save, you will save the results into an Microsoft Excel file that you can open, view, and edit.

Table 5: Features of Report Results Pages (Continued)

Click this…	To do this…
Graph icon	To view a graphical representation of the report results data. Note: You do not have the option to save this representation as a Microsoft Excel file. You can copy and paste the image into any Microsoft product.
Microsoft Outlook icon	To create and send a message to all of the associated users of the accounts represented in this report.
Mail message icon	To export a list of contacts and their corresponding information for the customers represented in this report.
Any column heading	To sort by that field.
Any product line	To view the details of the dollars being reported.
Vista ID	To view the Product Potential Mix page for the account.
Account Name	To view the Account Profile page for the account.

Creating a Target Project Report

To create a target project report:

1. **At the top of the page, click the Reports link.**

   The report area page appears with the Standard Reports tab active.

2. **Click the Project Reports tab.**

   The Project Reports tab becomes active.

3. **In the Target Projects area, complete the following fields as applicable:**

   - **Last Revision Date Range**
   - **Bid Date Range**
   - **Change Order Potential**
   - **Vendors**
   - **Products**
   - **Statuses**
   - **Reasons**
   - **Preferences**
   - **Zones**
   - **Districts**
   - **Internal Status**
   - **Segments**

Note: You can select multiple options by holding down the CTRL key as you click options.

4. **Click the Submit button.**

   The Target Project Results page appears.

Tip: To export the information on the Target Project Results page to a Microsoft Excel file, click the Export to Excel link at the top of the table.

Creating a Bid Tracking Report

To create a bid tracking report:

1. **At the top of the page, click the Reports link.**

   The report area page appears with the Standard Reports tab active.

2. **Click the Project Reports tab.**

   The Project Reports tab becomes active.

3. **In the Bid Tracking area, complete the following fields as applicable:**
   - **Bid Date Range**
   - **Bid Statuses**
   - **Job Types**
   - **Has GO Number**
   - **Zones**
   - **Districts**
   - **Products**

Note: You can select multiple options by holding down the CTRL key as you click options.

4. **If you wish to limit your results to a particular salesperson, then click the Sales Engineer Browse button.**

   The Sales Engineer Browse window appears.

5. **In the Sales Engineer’s Last Name field, type the Sales Engineer's last name and then click the Search button.**

Note: You can enter partial values to find all Sales Engineers whose last name begins with that value. For example, if you want to find all sales engineers with a last name that begins with “C,” then you would type “C” in the Sales Engineer's last name field.

   A list of matching sales engineers appears.

6. **Click a Sales Engineer listing.**

   On the Project Reports tab, in the Bid Tracking area, the Sales Engineer that you selected is displayed.

7. **If you wish to view detailed results, then click the View Detailed Results checkbox.**
8. **If you want to view details for a specific negotiation, then, in the Enter Neg Number field, type a negotiation number.**
9. **Click the Submit button.**

   The Bid Tracking Report page appears.
10. **If you did not choose to display the detailed results, then you can click the Click Here to View the Details Behind These Numbers link to view details for your results.**

Tip: To export the information on the Bid Tracking Report page to a Microsoft Excel file, click the Export to Excel link at the top of the table.

Creating a Product Sample Report

To create a product sample report:

1. **At the top of the page, click the Reports link.**

   The report area page appears with the Standard Reports tab active.
2. **Click the Sample Reports tab.**

   The Sample Reports tab becomes active.
3. **Click the Samples After Which Month drop-down menu and select a month and year.**
4. **Complete the following as applicable:**
   - The **Vista Customer Number** field.
   - The **Catalog Number** drop-down menu.
   - The **City The Product Was Shipped To** field.
   - The **State The Product Was Shipped To** field.
   - The **Geography** drop-down menu.
   - The **User That Made The Sample Request** drop-down menu.
5. **Click the Submit button.**

   The Product Sample Report Results page appears.

Creating a Task Report

To create a task report:

1. **At the top of the page, click the Reports link.**

   The Reports Area appears with the Standard Reports tab active.
2. **Click the Other Reports tab.**

   The Other Reports tab becomes active.
3. **In the Task Reports area, click the Whose Tasks Do You Want To See drop-down menu and select a person.**
4. **In the Task Reports area, complete any of the following drop-down menus as**

applicable to filter the report results:

- **Zone**
- **District**
- **Product**
- **EBE Category**

5. **If you want to include completed tasks, then click the See Completed Tasks checkbox.**
6. **Click the View Report button.**

   The Task Report results page appears.

Creating a Target Market Report

Sales engineers are not able to create target market reports.

To create a target market report:

1. **At the top of the page, click the Reports link.**

   The Reports Area appears with the Standard Reports tab active.

2. **Click the Other Reports tab.**

   The Other Reports tab becomes active.

3. **In the Target Market Reports area, click an option by which to group the report results.**
4. **In the Target Market Reports area, complete any of the following drop-down menus as applicable to filter the report results:**
   - **Division**
   - **Zone**
   - **District**
   - **Competitor Conversions**
   - **Market Segment**
5. **Click the View Report button.**

   The Target Market Account Report page appears.

Creating a Customer Visit Report

Tip: You can quickly create a report of your visits in the past year by clicking the My Visits in Past Year link.

To create a customer visit report:

1. **At the top of the page, click the Reports link.**

   The Reports Area appears with the Standard Reports tab active.

2. **Click the Other Reports tab.**

   The Other Reports tab becomes active.

3. **In the Customer Visit Reports area, complete any of the following drop-down**

menus as applicable to filter the report results:

- **Date of Visit**
- **Customer's District**
- **Reason for Visit**
- **Outcome of Visit**

4. **In the Customer Visit Reports area, click any of the Customer's Segment options as applicable.**
5. **Click the View Report button.**

   The Customer Visit Report Results page appears.

Note: To view additional details about a customer visit or to edit the customer visit log, click a Visit Description link.

Creating a Usage Report

If you have permission, you can create a report that shows the number of times Target Account Planner has been accessed within a specified time period.

To create a usage report:

1. **At the top of the page, click the Reports link.**

   The Reports Area appears with the Standard Reports tab active.

2. **Click the Other Reports tab.**

   The Other Reports tab becomes active.

3. **In the Usage Report area, click an option by which to group the results of the report.**
4. **In the Usage Report area, complete any of the following drop-down menus as applicable to filter the report results:**

   - **Month/Year**
   - **Geography**

5. **Click the View Report button.**

   The Usage Report Results page appears.

Appendix

Detailed Segment Definitions

End customers. Customers who purchase and use Eaton products.

- *Residential Builders.* Local, regional or national homebuilders.
  - *Single Family.* Customers who build individual homes.
  - *Multi-family/apartment.* Customers who build apartments, condominiums, and so on.
  - *Manufactured housing.* Customers who build pre-fabricated homes, apartments, and so on.
- *Commercial Building Owners.* Customers who build facilities for commerce.
  - *Multisite Retail.* Customers who build retail facilities with multiple locations across the country, such as Wal-Mart.
  - *Communications (Telecom/Data).* Customers involved with telecommunications or data transmission.
  - *Casino.* Customer who build gambling casinos.
  - *Shopping Mall.* Customers who build shopping malls.
  - *Owner/Developer.* Firm that either owns the locations or is the developer for that specific location.
  - *Property Manager.* Firm that manages the commercial facility.
  - *Financial Institution.* Firms that build and own banks, lending houses, and so on.
  - *Other Commercial.* Any other kind of commercial building owners not listed above.
- *Institutional.* Customers who build colleges, universities, hospitals, or religious institutions.
  - *K-12 Customers.* Customers who build any kind of college or university, including technical schools.
  - *Hospital.* Customers who build medical facilities.
  - *Other Institution.* Customers who build any other kind of institution not listed above (such as religious facilities).
- *Government.* Government agencies.
  - *Department of Defense.* Projects related to the Department of Defense.
  - *Federal Bureau of Prisons.* Projects related to federal prisons.
  - *Department of Energy.* Projects related to Department of Energy.

    - *Bureau of Reclamation.* Projects related to Bureau of Reclamation.
    - *Corps of Engineers.* Projects related to Corps of Engineers.
    - *General Services Agency.* Projects related to General Services Agency.
    - *NASA.* Projects related to NASA.
    - *US Post Office.* Projects related to US Post Office.
    - *Dept of Veteran Affairs.* Projects related to Dept of Veteran Affairs.
    - *Dept of Homeland Security.* Projects related to Dept of Homeland Security.
    - *Other Federal Government Agencies.* Any other Federal Government Agencies not listed above.
    - *Municipal/Authority.* Projects created by and funded by a local municipality or authority.
    - *State Governments.* State government projects (versus federally funded).
- *Industrial.* Products sold to customers for industrial applications such as pulp & paper, automotive, and so on.
    - *Automotive & Assembly.* Automotive facilities and assembly plants.
    - *Food.* Food processing, packaging, testing, shipping.
    - *Forest Products.* Pulp and paper.
    - *Metals.* Customer's business directly related to the metals industry.
    - *Mining.* Customer's business directly related to the mining industry.
    - *Petrochemical.* Companies involved in the process of obtaining fuel from petroleum or natural gas.
    - *Pharmaceutical/Biotech.* Companies involved in the process of researching, manufacturing, and distributing drugs for the medical industry.
    - *High Tech/Electronics/Instrumentation.* Companies involved in the manufacturing of high technology electronics equipment.
    - *Textiles & Apparel.* Companies involved with manufacturing and/or distributing of fabrics and materials.
    - *Logistics, warehousing, transport companies.* Companies involved with managing logistics, warehousing, or transportation of various products.
    - *Other Industrial.* Any other Industrials not listed above.
- *Public Works, Infrastructure and Entertainment.* Companies involved with equipment or services needed for large city efficiencies.
    - *Airport.* Any airports, including regional or those located in major cities.
    - *Water/Wastewater.* Companies involved in providing water for use throughout cities or towns.
    - *Stadiums/Convention Centers.* Large facilities designed to house sporting events or large convention type events.

- *Amusement Facilities.* Amusement parks, carnivals, and so on.
- *Other Infrastructure.* Any other Infrastructure not listed above.

- *Utility.* Electrical utility companies.
- *Non-Billable Channel.* Customers that are channel customers but are treated as end customers by Eaton.
    - *Non-Billable Distributor.* Distributors that do not purchase products directly from Eaton.
    - *Non-Billable DIY.* DIY accounts that are not allowed to purchase products directly from Eaton.
- *Transportation Systems.* Anything that transports people or material.
    - *Rail/Transit Systems.* Railroads, underground or above ground transportations, such as subways or trolleys.
    - *Navy/Marine.* Transportation related to Navy or Marine applications.
    - *Car/truck/tractor systems.* Transportation related to cars, trucks, or tractors.
    - *Other non facility or process related systems*. Any other non-facility or process related systems not listed above.
- *Other End Users.* Any other end users not listed above in one of the major sub segments (such as agriculture). Please specify.

Intermediary customers. Customer who works as the link between the manufacturer and end user of equipment.

- *Engineer Constructor.* Company that specifies and/or purchases (on the owner's behalf) electrical equipment.
- *Contractor.* Firm that contracts to build electrical projects.
    - *Residential Contractor.* Contractors that work on residential projects.
        - *Single Family.* Contractors that work on single family homes.
        - *Multi-Family.* Contractors that work on multi-family homes (apartments, condos, and so on).
    - *Non-Resi Contractor.* Contractors that work on non-residential projects.
        - *National/Regional Roll-up.* Contractors that have a national or regional focus (not one location only).
        - *Design Build.* Contractors involved with negotiated work on a project where the owner contacts general/electrical contractor to design job, and the GC or EC negotiates with electrical manufacturer.
        - *Spec-Bid-Buy.* Projects that involve limited partnering with the electrical manufacturer; consultant typically specifies to numerous GCs/ECs, who then work with numerous sub contractors, who in turn work with electrical manufacturers for bids.
        - *Commercial.* Contractors that work on commercial projects.
        - *Industrial.* Contractors that work on industrial projects.

- *Power Distributor OEM.* OEM who uses electrical component products to manufacture their equipment.
    - *Full-line Electrical Equipment Mfg.* A competitor to Eaton who uses our components to manufacture their equipment.
    - *Panelboard/Switchboard.* Manufactures primarily panelboards and switchboards, using our breakers.
    - *Switchgear Assemblers.* Manufactures LV and MV distribution equipment, using our components.
    - *Integrated Power Assembly/House Builder.* Manufactures electrical equipment using our components and then builds a housing around the equipment for outdoor/severe applications.
    - *Generator Systems.* Manufactures equipment that include traditional redundant power sources, such as generators.
    - *Alternative Power/Fuel Cells.* Manufactures equipment that include non-traditional redundant power sources, such as fuel cells.
    - *UPS Systems.* Manufactures equipment that incorporate UPS systems.
    - *Other EOEM.* Any other Electrical OEM customers not listed above.
- *Building Equip OEM.* Customers who supply products to maintain systems in buildings.
    - *HVACR.* Customers involved with heating, ventilation, air conditioning or refrigeration.
    - *Pumps/Compressors.* Customers who service and supply pumps and compressors for building systems.
    - *Material Handling.* Customers who manufacture, service and supply and kind of conveyors or conveying systems.
    - *Elevator/Escalator.* Customers who manufacture, service, and supply people-moving equipment.
    - *Other Building Equipment.* Any other building equipment suppliers not listed above.
- *Process Machinery OEM.* OEMs involved with supplying equipment to run various processes in a facility.
    - *Semiconductor Equipment.* OEMs who manufacture, supply, or service products to the semiconductor market.
    - *Packaging Equipment.* OEMs who manufacture, supply, or service products to the packaging industry.
    - *Converting Equipment.* OEMs who manufacture, supply, or service products involved with converting materials (paper, plastics, cardboard).
    - *Aggregate Equipment.* OEMs who manufacture, supply, or service products to the aggregate equipment industry (crushers, screeners, mixers).
    - *Other Machinery OEMs.* Any other machinery OEMs not listed above.
- *System Integrator/Value Added Reseller.* A customer who integrates electrical equipment with other services/products a customer may need.

Channel customers. The customer who purchases the electrical equipment.

- *Electrical Distributors.* Traditional distributors who stock and sell Electrical equipment.
    - *Multinational Chain.* Distributors who have locations across the US and overseas.
    - *National Chain.* Distributors who have locations across the US.
    - *Regional Chain.* Distributors who have locations across a specific region of the US.
    - *Local Independent.* Distributors who have only one location and are considered local to a specific market.
    - *Misc Stocking Distributor.* Distributor that stocks some of our products, but is not formally signed for major groups of our products.
- *Other Distributors.* Non-traditional channel partners who purchase electrical equipment.
    - *HVAC / Mechanical Distributors.* Distributors focused on the mechanical issues at a customer, including heating ventilation and air conditioning.
    - *Power Transmission Distributors.* Distributors focused on transmitting power.
    - *Fluid Power Distributors.* Distributors who serve Eaton's Fluid Power division's customers.
    - *EASA Motor Distributor / Repair Shop.* Distributors involved with motor distribution or rewind/repair.
    - *Industrial Supply Distributors.* Distributors who supply a large variety of industrial products, not just electrical focused products.
    - *Specialty Distributors (Product Specific).* Distributors focused on a very specific market/industry.
    - *Utility Distributors.* Distributors who serve electrical utilities.
    - *Manufactured Housing.* Manufacturers of prefabricated housing such as mobile homes. They would purchase our residential load centers and equipment to be built into their end products (manufacturing housing).
- *Engine Generator Dealers.* Dealers who serve the engine generator market (typically CAT Dealers).
- *Retail / DIY.* Nationally or regionally based do-it-yourself stores.
    - *Home Centers.* National, multi-location customers focused on home improvement, such as Lowe's, The Home Depot, and so on.
    - *Hardware Co-ops / Wholesalers / Other.* Regionally focused customers selling electrical products, such as ACE Hardware.
    - *Electronic Retailers.* National or regional customers who sell electronic products, such as Radio Shack.
- *Catalog / Internet Companies.* Companies who sell electrical products through large catalogs or over the internet.

Other influencers/specifiers. Companies that do not purchase or use electrical equipment, but who are involved in influencing specification efforts.

- *Consulting Engineer*. Consulting engineering firms who design and specify electrical equipment.
- *Architect.* Architect firms who an owner may go to design a new project, which will include electrical equipment.
- *Alliance/Marketing Partner.* A partner with whom we have formed an alliance who can influence specification efforts with the owner/end user of the equipment.

Account Setup Information Worksheet

This document lists the information that you will be asked for to set up a customer account in Target Account Planner. Some of the information listed only pertains to specific customer types. You can use this document as a worksheet to ensure that you have the information you will need before you begin entering the information in Target Account Planner.

All Customer Accounts

This information is recommended for all new customer account types, including end customers, direct customers, and distributors.

Customer Information

Information Needed	Description	Write Your Information Below
Customer Name	Include required business identifiers such as “Ltd.” or “Inc.” as in “Sample Customer, Ltd.”	
Parent Customer	If this customer is a “child” of a parent customer (such as a branch location), you must specify the Vista ID of the parent customer. You can browse for the Vista ID of a parent customer if you know the parent customer’s name.	
Lead Sales Engineer	At least one (and at most four) sales representative(s) must be assigned to the customer. You can browse for the sales IDs if you know the names of the sales people.	
Sales Engineer 2		
Sales Engineer 3		
Sales Engineer 4		
District		
Segments	The classification for this customer to designate which segment of the market the customer is part of. You can browse for segment information to ensure that the primary, secondary and sub-segments are populated correctly.	

Business Information

Information Needed	Description	Write Your Information Below
Options	**Direct:** indicates that this is a direct customer; if you select this check box, you will designate the customer as a direct customer and Vista will process the request through all required review steps. **Excemption Certificate on File:** indicates that there is a tax exemption certificate on file for this customer. A current copy of the state sales tax exemption certificate must accompany this form and must be made out to Eaton Electrical, Inc. Please forward these forms to the Credit Department. **Order Confirmation Print:** indicates that printed order confirmations will be sent via fax or email with every order submitted for this customer.	
Number of Employees	The estimated number of employees located at the customer site for the account you are creating.	
Application	Indicates the type of work being performed at this customer location. You will only need to designate application information if this customer's specific location isn't performing according to the segment selection. For example, Exxon may be segmented as End Customer/ Industrial/Petrochemical, but this specific location is a convenience store. You would then designate the application as "Retail Facility."	
Target Account	A selection in this list implies that the account is flagged as a Target Account for a local district and/or a division of Eaton. Only a District Manager or Sales Engineer will have access to specify an account as a Target Account using the drop-down list. If an account is requested to be set up as a Target Account, a District Manager or Sales Engineer can select the appropriate division(s) who will have access to the account as a Target Account. For example, someone from the Industrial Controls Division (ICD) contacts a Sales Engineer and requests that an important customer be created as a Target Account for ICD. An account flagged as a Target Account will appear on your home page in Target Account Planner.	
Focus Type	The focus type is a classification used for marketing purposes. If you are unsure of the focus type, leave this field blank in Target Account Planner.	

Addresses

Information Needed	Description	Write Your Information Below
Business Address	The address of the physical location for this account. This address should include street, city, state/province, postal code, country, phone, fax, and website.	
Shipping Address	The address to where orders should be shipped, if different from the business address. This address should include street, city, state/province, postal code, and country. You may choose to populate the business address as the shipping address.	
Bill-To Address	The address to where invoices should be sent, if different from the business address. This address should include street, city, state/province, postal code, and country. You may choose to populate the business address as the bill-to address.	

Contacts

Information Needed	Description	Write Your Information Below
Contacts	Contact information for this account. This contact should include fist and last name, job description, functional position, phone, fax, email, and a designation as to weather or not this contact can be used for pricing questions. You can add multiple contacts to an account.	
Background Information	General comments regarding the account	

Cross Reference

Information Needed	Description	Write Your Information Below
Cross-Reference Information	There are four optional fields for cross-reference information, depending on what type of account you are setting up. Cross-reference information refers to an alphanumeric identifier that our customers use to track their customers or locations. • **DPC-Number:** external customer number for Wesco. It is made up of two parts - the Wesco branch selling products to this customer and the branch's customer number for this account. • **Synergy Code:** identifier for Powerware locations. • **Genesis Number:** Power generation customer cross-reference number. • **Store Number:** store number for DIY or Wesco locations.	

Direct Customers & Distributors

If you are adding direct customers or distributors, you are also required to specify Credit Authorization information.

Information Needed	Description	Write Your Information Below
Financial Information	The customer's bank affiliation.	
Trade References	Who the customer has done business with before and how to contact them. At least one trade reference is required for a direct customer.	

Distributors Only

If you are adding a distributor, you are also required to complete four additional forms to provide application, product module, and impact analysis information.

Distributor Application

The distributor application is five pages in length. Be sure to click on the pages in Target Account Planner to complete all required information.

Page 1:

Information Needed	Description	Write Your Information Below
Account: Federal Tax ID	The number given to the customer by the federal government for tax purposes	
Applying For	What type of distributor account your are applying for: • New Location • Reauthoriation • Change of ownership • Other If you have a previous customer name and Vista number, include them in the appropriate fields.	
Business Details	**Form of Ownership:** options include Corporation, Sole Proprietary, Partnership, Subsidiary, Other **Primary business activity:** options include Electrical Distributor, HVAC/Mechanical Distributor, Fluid Power Distributor	

Page 2:

Information Needed	Description	Write Your Information Below
Location Details	What type of location this distributor location is: • Main Headquarters • Branch of a Chain If you select Branch of a Chain, you must include the name of the chain, number of branches, and years at location.	
Facilities	What is the square footage of the facility and what facilities exist at this location?	
Services	What services are provided at this location?	
Electronic Commercial	What e-commerce capabilities does the distributor currently have?	

Page 3:

Information Needed	Description	Write Your Information Below
Personnel	How many people work in the following areas: • **Inside Sales:** Construction, Industrial, or General • **Outside Sales:** construction, Industrial, or General • **Non Sales:** Management, Counter Sales, Specialists, Electrical Engineers, Warehouse/Drivers, Administrative/Other	
Key Management Personnel	Contract information for key management personnel	

Page 4:

Information Needed	Description	Write Your Information Below
Customer Segments	What percentage of total sales does this distributor do with the following different segments: • End Customer Segments • Intermediary Customers • Channel • Other Influencers/Specifiers • Commercial Building Owners • Transportation Systems • Other	
Products/Sales	What percentage of total sales does this distributor do with different types of products: • Standard Distribution Equipment • Engineered Distribution Equipment • Eng Pwr Prod Total • DE Component Total • Control Prod Total • Power Quality Total etc.	
Market Coverage	What are the primary countries that this distributor sells to and what is the percent sold through stock?	

Information Needed	Description	Write Your Information Below
Key Customers	What key customers does this distributor do a lot of business with that may be advantageous for Eaton? You can click the Choose Accounts link to search for and designate a key customer. Once a key customer is selected, you can specify product opportunities and potential earnings for Eaton.	

Page 5:

Information Needed	Description	Write Your Information Below
Top Five Suppliers	What suppliers supply the top products that this distributor sells?	
Sales and Inventory	Sales and inventory data for current year, previous years, inventory, etc.	
Additional Information	Indicates if the customer participates in NAED, buying group associations, trade associations and other.	

Product Modules

The Product Module Request form allows you to mark what product modules you want this distributor to have. The form includes reference indicators for pricing for each product module.

- An “X” designates full access to product at the discounted price in the Price and Availability Digest.
- An “A” designates that product will be avaiable, but at higher access price.

The product Modules are listed below:

Code	Description	Code	Description
C	CONSTRUCTION MODULE	A6	IDT OPERATOR INTERFACE
I/C	IND/CON MODULE	PFC	POWER FACTOR CORRECTION
R	RESIDENTIAL MODULE	P	PANELBOARDS STKG
M	MINING CIRCUIT BREAKER MODULE	CHD	CH CRANE DISTRIBUTOR
S	SWITCHGEAR MODULE	CHS	CH CRANE STOCKING DISTRIBUTOR
A3	PLC'S	CCD	CEE CRANE DISTRIBUTOR
A5	COUNT CONTROL	CCS	CEE CRANE STOCKING DISTRIBUTOR
A1	IMPACC COMMUNICATIONS PRODUCTS	ITF	INNOVATIVE TECHNOLOGY FL
A2	ADJ SPEED DRIVES	SEL	SELMA PRODUCTS
A4	PHOTO & PROX SENSORS	REY	REYNOSA PRODUCTS

Impact Analysis

The Impact Analysis form is optional, but is recommended for efficient processing of distributor data. It allows you to identify the net impact of adding a distributor to our business.

Information Needed	Description	Write Your Information Below
Maintain	The amount of sales that you expect to maintain at existing distributors when adding this distributor.	
Grow	The amount of sales that you expect to achieve at existing distributors due to organic growth.	
Penetrate	The amount of new sales that you expect to achieve at existing distributors due to obtaining new customers or markets.	
Distributors to Add	The amount of new sales that you expect to achieve because of adding this distributor.	
Distributor to Terminate	The amount of sales lost because of distributors that will need to be terminated to add this distributor.	
Distributors at Risk	The amount of sales at existing distributors that may decline or go away due to adding this distributor.	
Area Impact	The net impact this distributor will have on this geographic area.	
Impact of Chains	The impact this distributor will have in other geographies.	
Total Impact	The net impact Eaton will experience when adding this distributor.	

Summary

The Summary form is an overview of the distributor's key information for District Managers, Zone Managers, and Channel Marketing. The data on this form must be completed, however, as it is different from the data required on the other forms.

Information Needed	Description	Write Your Information Below
Commitment Level	Indicates the level of commitment that Eaton will get from this distributor.	
Exclusive Commitment	If an exclusive commitment is made with Eaton, indicate the date when the commitment ends.	
Projected Total Eaton Sales	The projected amount of sales that will be obtained by working with this distributor after one year and after three years.	

Information Needed	Description	Write Your Information Below
Estimated % Breakdown of Sales	The projected amount of sales that Eaton and other competitors will obtain as a percentage based on working with this distributor.	
Distributors Impacted	Identifies sales and other authorized distributors in the market place that could potentially shift business if this distributor is set up to do business with Eaton.	
Net Area Impact	Sums the total sales that may be lost if we terminate a distributor to add this distributor, or lost business at dual line distributors that may choose to shift their business to a competitor (based on Eaton authorization this distributor) plus the new business the applying distributor will bring to Eaton.	