

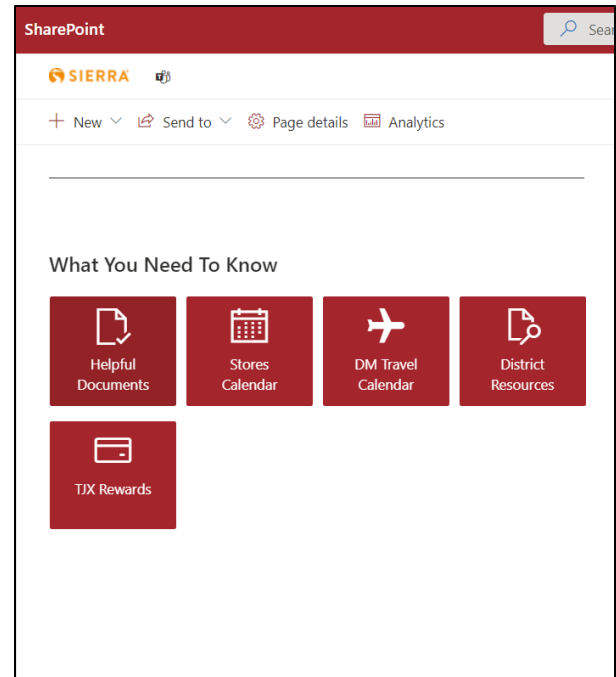
Quick Reference Guide

Site Use & Navigation – The Summit Stores Portal

Updating the District Manager (DM) Travel Calendar

To better support awareness of District Manager availability and travel, the *DM Travel Calendar* has been updated to reflect a global view of all DM travel, events, and store visitation. To add-to or update the DM travel calendar, follow these steps:

- 1) Access the home page of The Summit by clicking [here](#)
- 2) Scroll to the 'What You Need to Know' section
- 3) Select the DM Travel Calendar tile
- 4) From the left navigation menu, select the corresponding District Number for the DM
- 5) Select a date by clicking/tapping that date box on the Calendar, then click/tap the 'Add' button
- 6) In the 'New Item' box, enter event information in the following fields:
 - a) Title = enter the name of the event
 - b) Location = enter the location of the event (open text, any format)
 - c) Start Time & End Time
 - d) All Day Event and/or Recurrence = select either or both features to create an all-day or repeating event
- 7) Select Save. The event will save to the District and Master Calendar. Return to the main DM Travel Calendar page to view all events for all districts.



Adding, Updating and Exporting Documents – Site Admins

The Summit allows Site Administrators the ability to add (upload), modify, export, and delete documents and resources that provide information to both the stores organization and Home Office. Supported document types include, but are not limited to, Adobe PDF and Microsoft Word, Excel, and PowerPoint.

To upload a new or updated document to The Summit, follow these steps:

- 1) Access the home page of The Summit by clicking [here](#)
- 2) In the top right corner of the page, select the cogwheel icon, then select 'Site Contents'

3) From the Site Contents list, select the appropriate document library (i.e. 'Retail Surveys'). Then, select the correct folder, if applicable.

4) From the upper navigation bar, select Upload, then select either 'Files' or 'Folder'

5) From the Explorer Window, select the file/s from the last saved location on the computer or OneDrive


6) Select 'Open' and the file will be added to the selected site library/folder.

To export or delete a document from The Summit, follow these steps:

1) Access the home page of The Summit by clicking [here](#)

2) In the top right corner of the page, select the cogwheel icon, then select 'Site Contents'

3) From the Site Contents list, select the appropriate document library (i.e. 'Retail Surveys'). Then, select the correct folder, if applicable.

4) To **export** a file, hover over the selected file and click/tap the vertical-three-dot icon  to open the options menu. Select 'Download' and the file will automatically download to the default downloads location on the computer.

5) To **delete** a file, hover over the selected file and click/tap the vertical-three-dot icon to open the options menu. Select 'Delete' and a pop-up window will ask to verify the deletion. Select Delete once more to complete the file deletion process. Note: if an item has been accidentally deleted, it can be retrieved within 30 days. Contact the Site Gatekeeper to facilitate the request.

