Sysco Corporate Rebates (Retool App) User Guide

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Executive Summary

The Sysco Corporate Rebates (Retool App) User Guide is deigned to help the user understand how to navigate and use the features within the Sysco Corporate Rebates app. The user guide showcases how to add, modify and delete data within the Sysco Corporate Rebates app, as well as how to filter, sort, and download data within the Sysco Corporate Rebates app. The user guide also lists important notes from the developer that the user should be aware of when interacting with the Sysco Corporate Rebates app.

The Sysco Corporate Rebates app is designed to allow internal Krispy crunchy employees to add and modify the rebate information that is utilized within the Sysco Monthly Rebate Dashboard in Power BI.

Data

The Sysco Corporate Rebates app contains 2 datasets, Corporation Rebates and Corporation Rebate Assignments. The Sysco Corporate Rebates app allows the user to add, modify and remove data within these 2 datasets, that will then be utilized within the Sysco Monthly Rebate Dashboard in Power BI.

Corporation Rebates

The Corporation Rebates data is a list of rebates by corporation. The data contains the rebate percentage per lbs., products eligible for the rebate, the rebate schedule and the average rebate amount for each corporation.

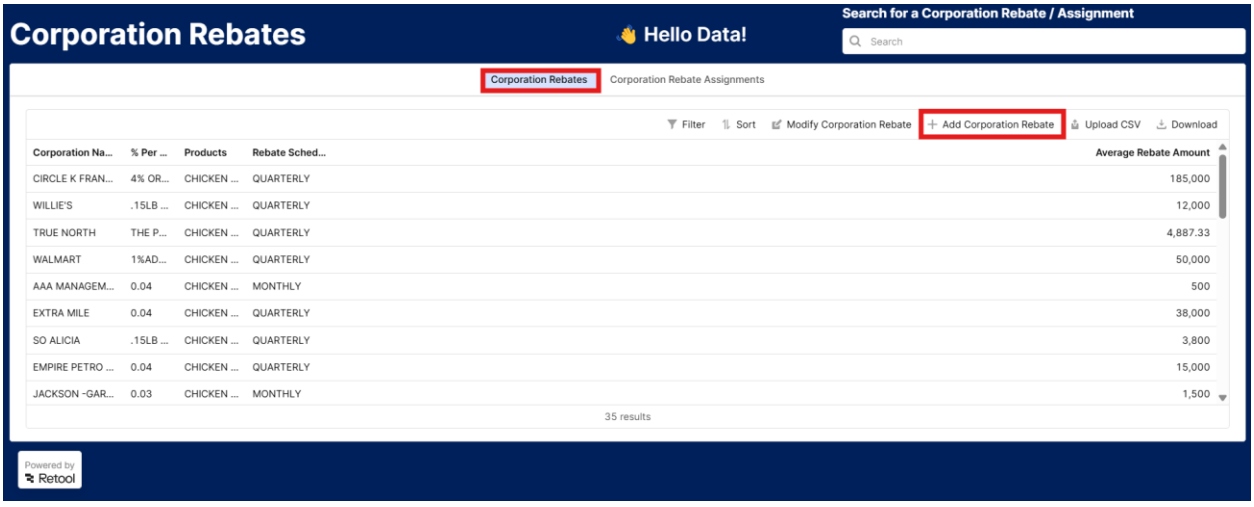
Add Corporation Rebate

To add new corporation rebates that will be utilized within the Sysco Monthly Rebate Dashboard, you can use the **Add Corporation Rebate** feature within the Sysco Corporate Rebates app, which adds new corporation rebate records, one at a time.

Here is how to utilize the **Add Corporation Rebate** feature within the Sysco Corporate Rebates app:

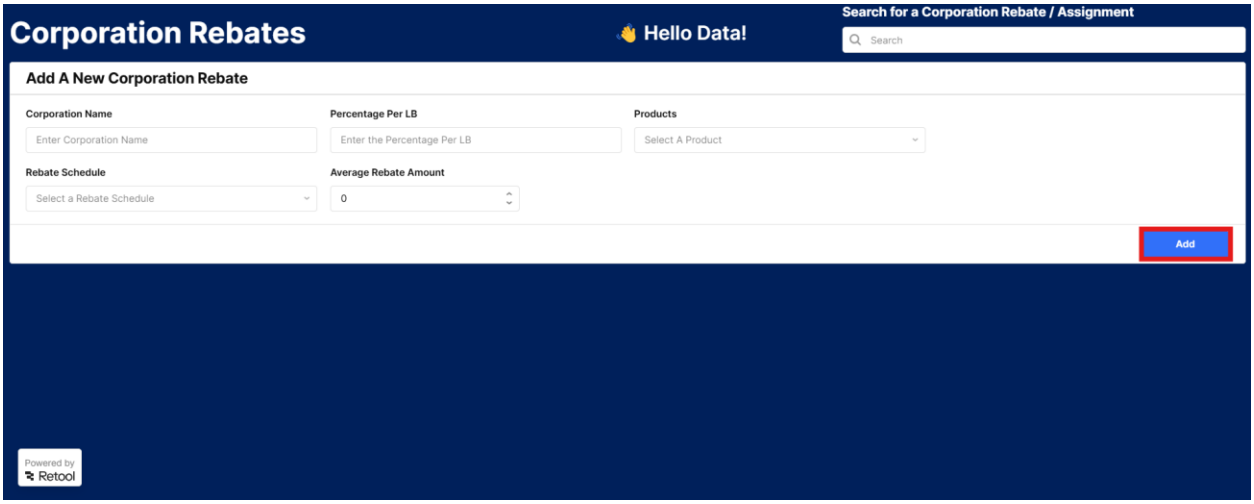
Step 1: Select **Corporation Rebates** at the top of the table

Step 2: Select **Add Corporation Rebate**



Step 3: The **Add A New Corporation Rebate** form will appear. Fill out the form with the details of the new corporation rebate

Step 4: Click **Add**



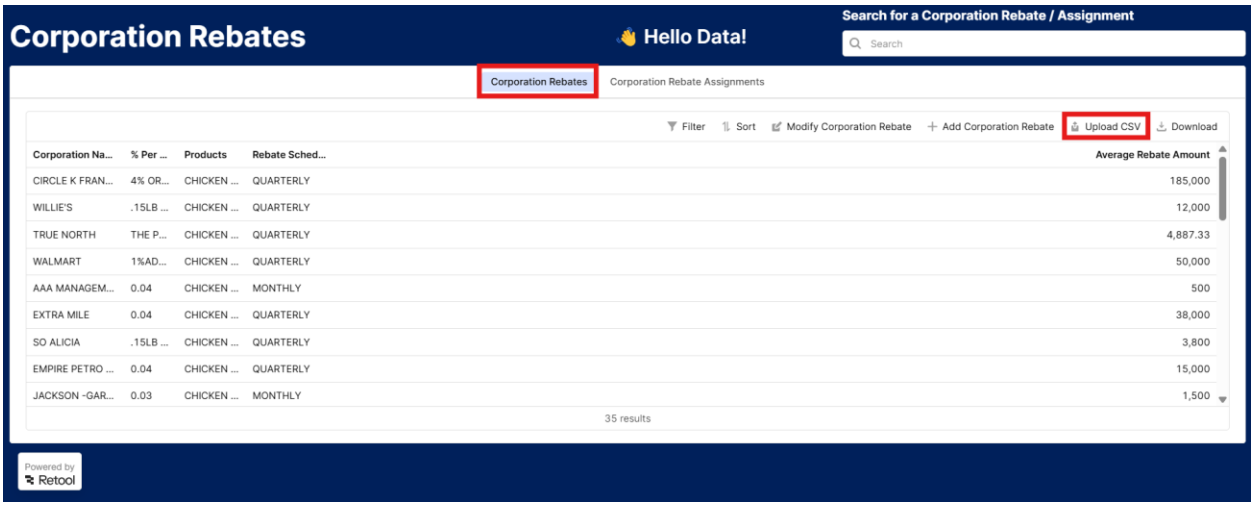
Upload Corporation Rebate csv file

To add multiple new corporation rebates that will be utilized within the Sysco Monthly Rebate Dashboard, you can use the **Upload CSV** feature within the Sysco Corporate Rebates app, which adds one or more new corporation rebate records.

Here is how to utilize the **Upload CSV** feature within the Sysco Corporate Rebates app:

Step 1: Select **Corporation Rebates** at the top of the table

Step 2: Select **Upload CSV**

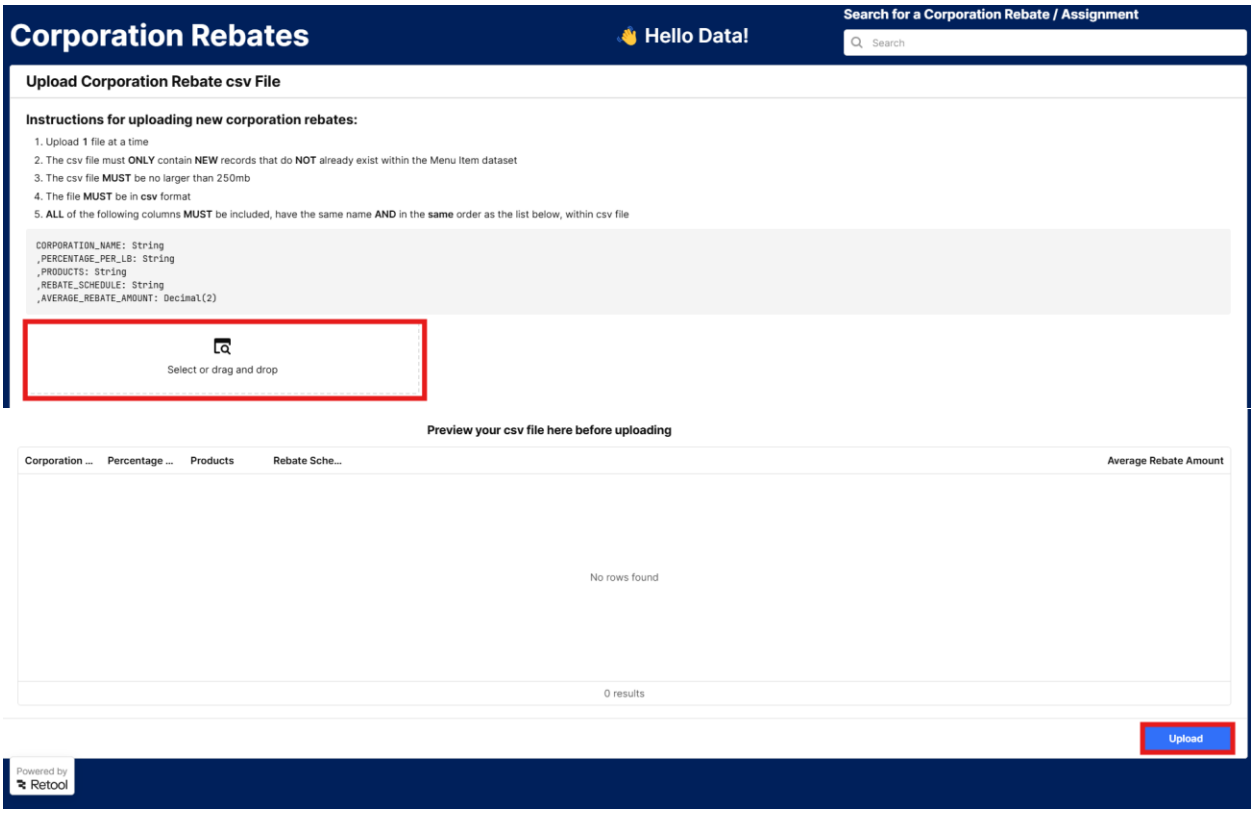


Step 3: The **Upload Corporation csv File** form will appear. Select **Select or drag and drop**

Step 4: Select the csv file that you wish to upload

- *Note: Be sure to follow the **Instructions for uploading new corporation rebates** section*

Step 4: Click **Upload**



Modify Corporation Rebate

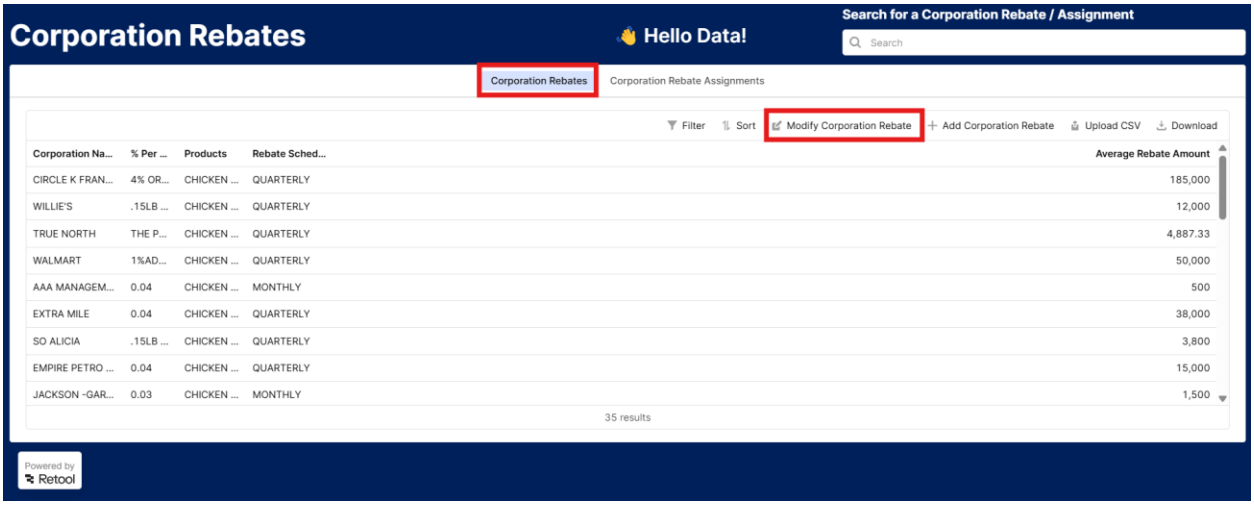
To modify existing corporation rebates that are being utilized within the Sysco Monthly Rebate Dashboard, you can use the **Modify Corporation Rebate** feature within the Sysco Corporate Rebates app, which modifies existing corporation rebate records, one at a time.

Here is how to utilize the **Modify Corporation Rebate** feature within the Sysco Corporate Rebates app:

Step 1: Select **Corporation Rebates** at the top of the table

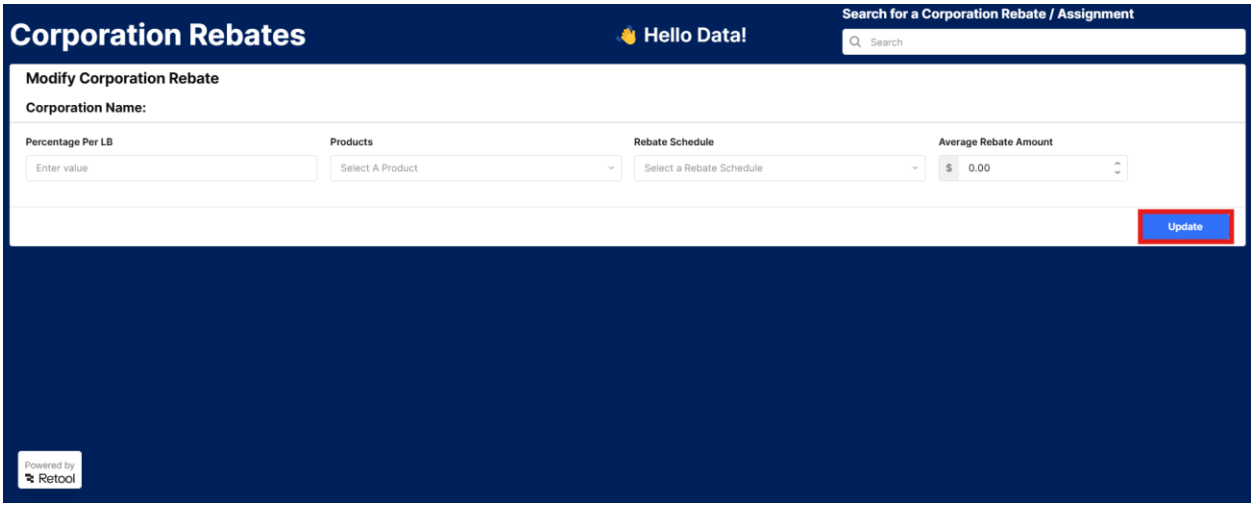
Step 2: Select the corporation rebate record that you wish to modify from the table

Step 3: Select **Modify Corporation Rebate**



Step 4: The **Modify Corporation Rebate** form will appear. Update the form with the updated details of the new corporation rebate

Step 5: Click **Update**



Corporation Rebate Assignments

The corporation rebate assignments data is a list of KKC IDs, along with the corporation rebate that the KKC ID has been assigned to. Each KKC ID can be assigned to one or more corporation rebate.

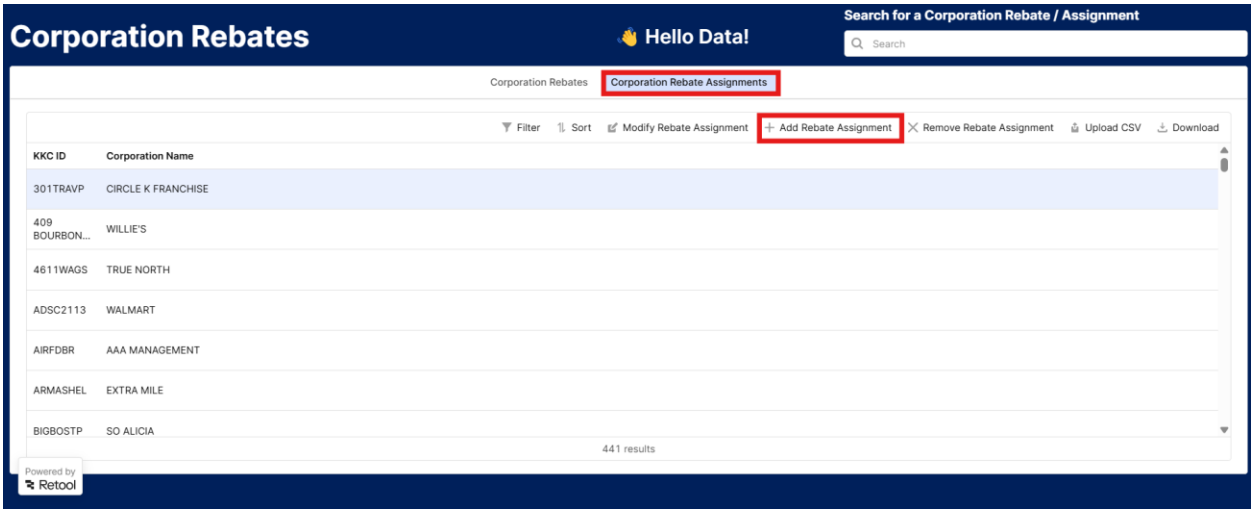
Add Corporation Rebate Assignment

To add new corporation rebate assignments that will be utilized within the Sysco Monthly Rebate Dashboard, you can use the “Add Corporation Rebate Assignment” feature within the Sysco Corporate Rebates app, which adds new corporation rebate assignment records, one at a time.

Here is how to utilize the “Add Rebate Assignment” feature within the Sysco Corporate Rebates app:

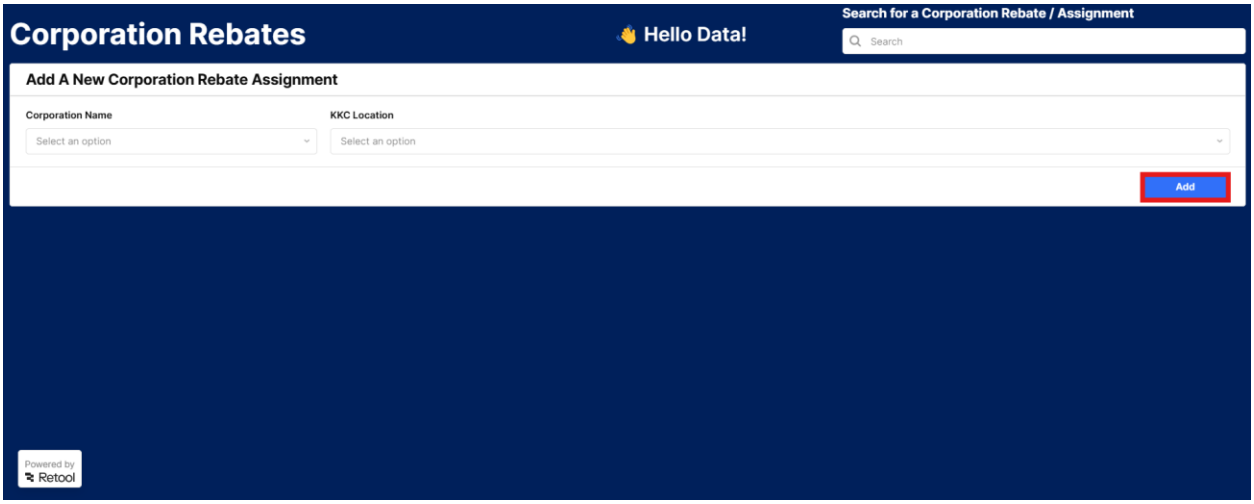
Step 1: Select **Corporation Rebate Assignments** at the top of the table

Step 2: Select **Add Rebate Assignment**



Step 3: The **Add A New Corporation Rebate Assignment** form will appear. Fill out the form with the details of the new corporation rebate assignment

Step 4: Click **Add**



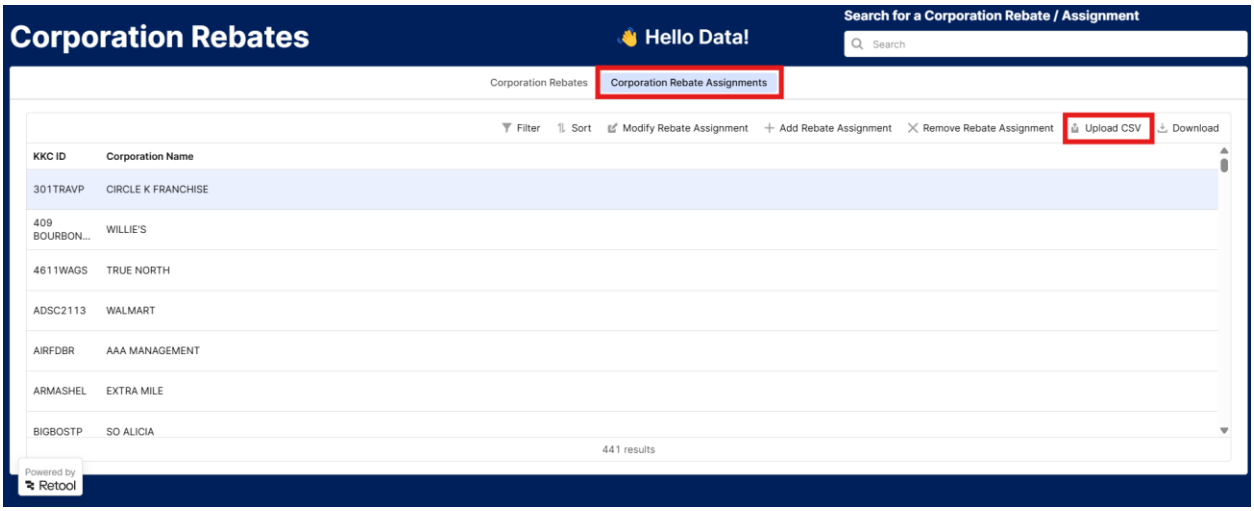
Upload Corporation Rebate Assignment csv file

To add multiple new corporation rebate assignments that will be utilized within the Sysco Monthly Rebate Dashboard, you can use the **Upload CSV** feature within the Sysco Corporate Rebates app, which adds one or more new corporation rebate assignment records.

Here is how to utilize the **Upload CSV** feature within the Sysco Corporate Rebates app:

Step 1: Select **Corporation Rebate Assignments** at the top of the table

Step 2: Select **Upload CSV**

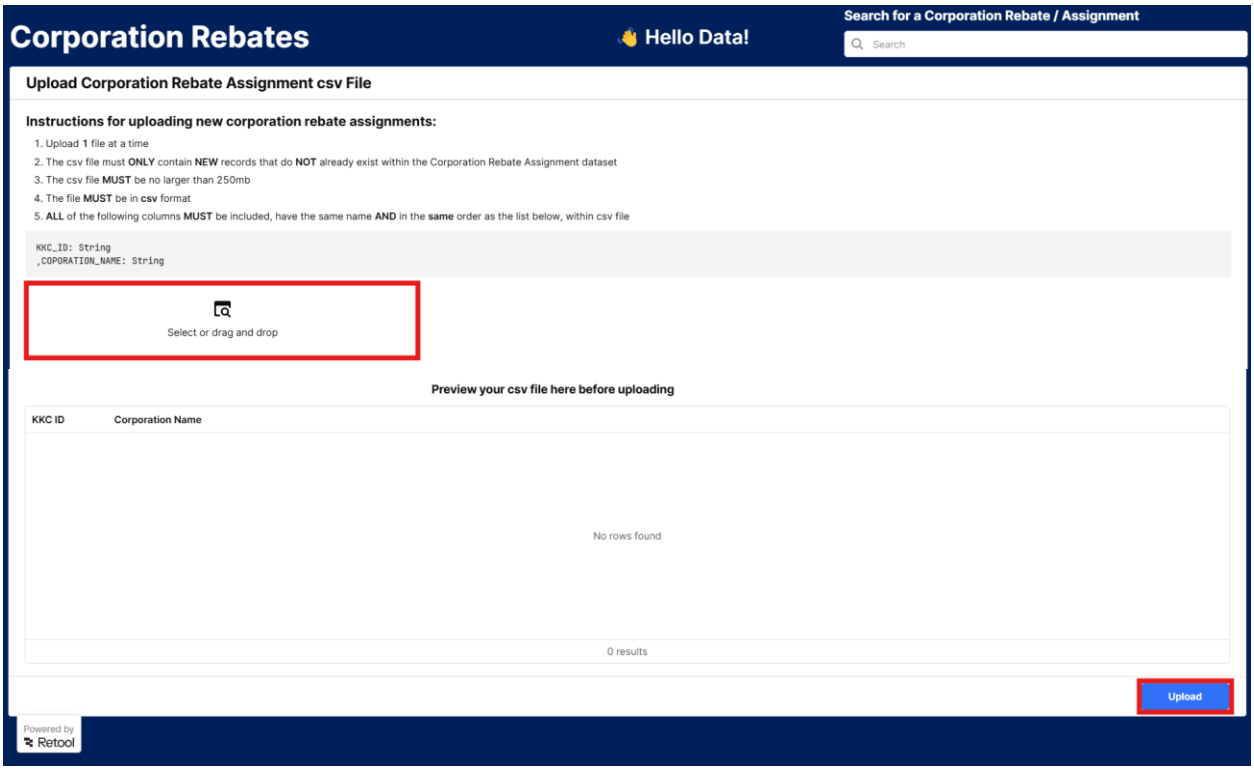


Step 3: The **Upload Corporation csv File** form will appear. Select **Select or drag and drop**

Step 4: Select the csv file that you wish to upload

**** Note: Be sure to follow the **Instructions for uploading new corporation rebates** section*

Step 4: Click **Upload**



Modify Corporation Rebate Assignment

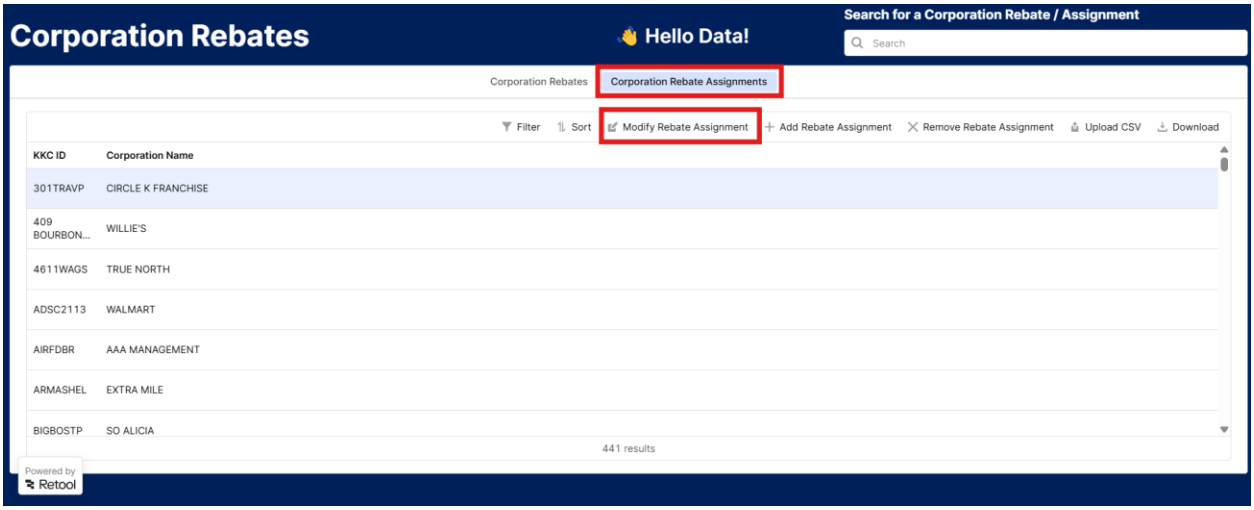
To modify existing corporation rebate assignments that are being utilized within the Sysco Monthly Rebate Dashboard, you can use the **Modify Rebate Assignment** feature within the Sysco Corporate Rebates app, which modifies existing corporation rebate assignment records, one at a time.

Here is how to utilize the **Modify Rebate Assignment** feature within the Sysco Corporate Rebates app:

Step 1: Select **Corporation Rebate Assignments** at the top of the table

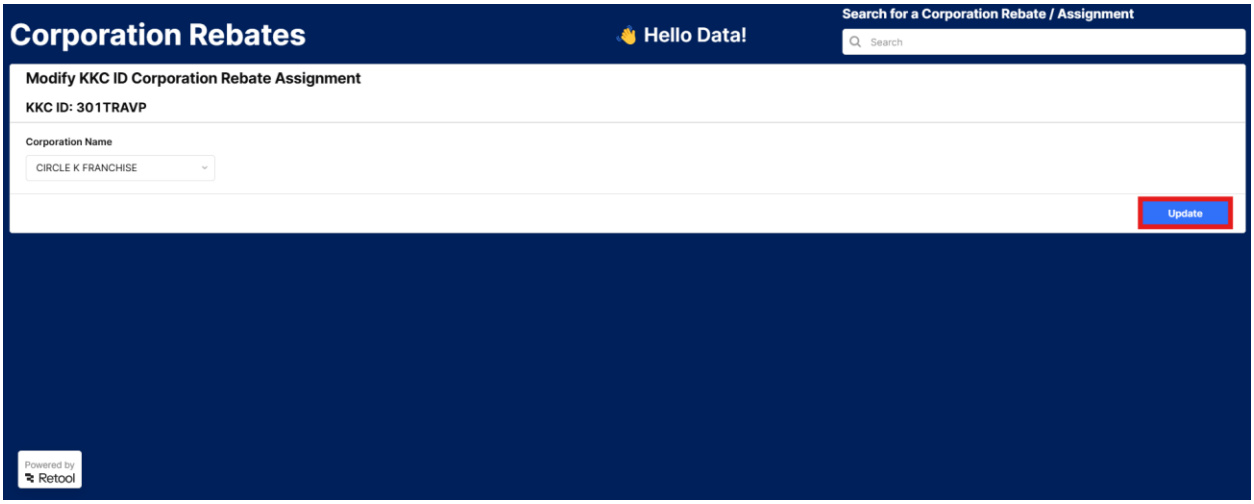
Step 2: Select the rebate assignment record that you wish to modify from the table

Step 3: Select **Modify Rebate Assignment**



Step 4: The **Modify Rebate Assignment** form will appear. Select the new **Corporation Name** to assign the KKC ID to

Step 5: Click **Update**



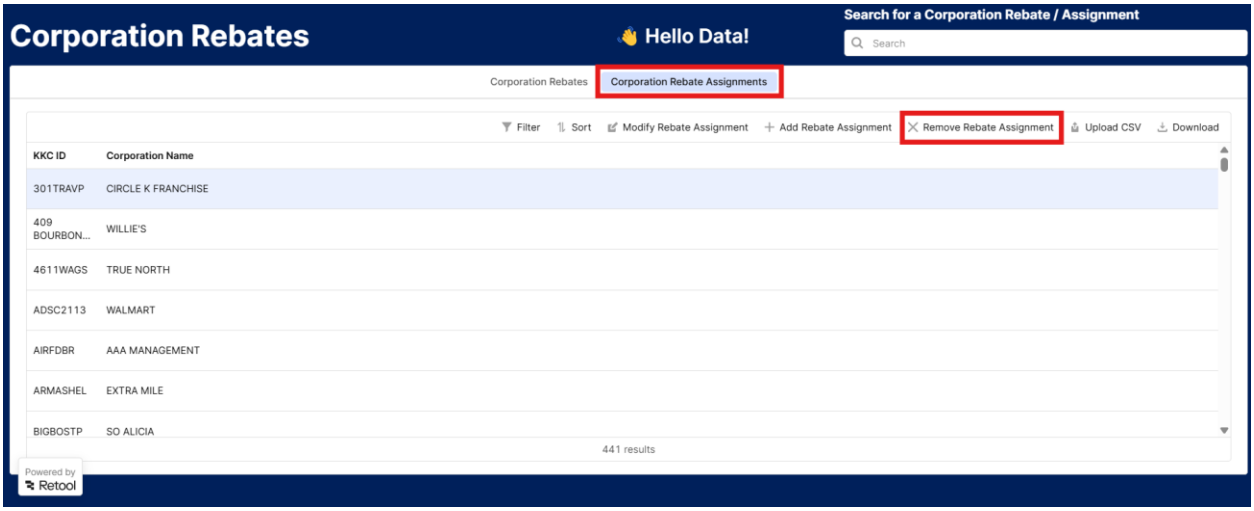
Remove Corporation Rebate Assignment

To remove existing corporation rebate assignments that are being utilized within the Sysco Monthly Rebate Dashboard, you can use the **Remove Rebate Assignment** feature within the Sysco Corporate Rebates app, which removes existing corporation rebate assignment records, one at a time.

Here is how to utilize the **Remove Rebate Assignment** feature within the Sysco Corporate Rebates app:

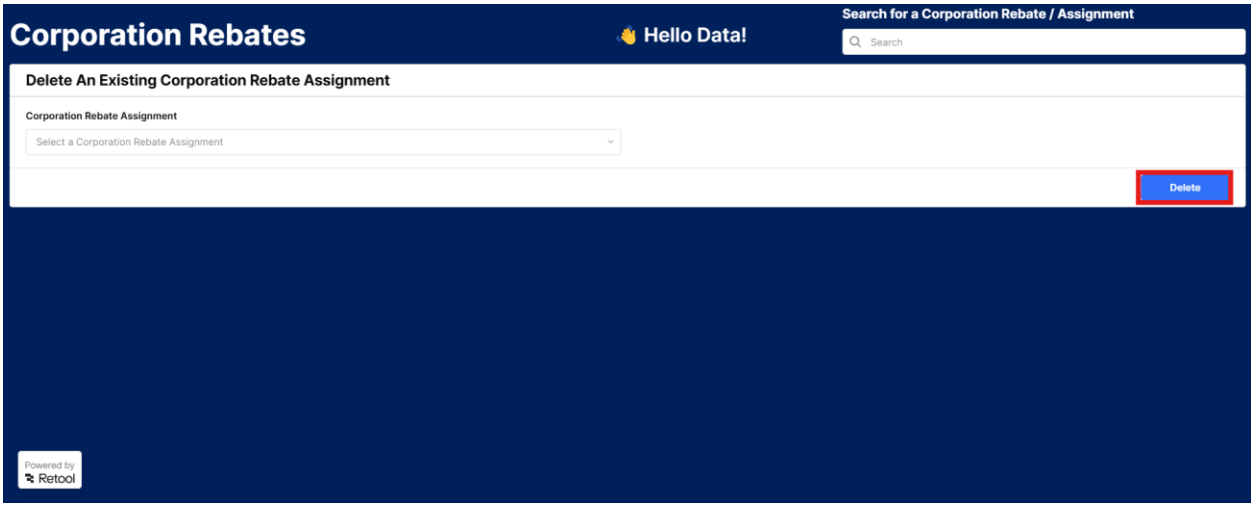
Step 1: Select **Corporation Rebate Assignments** at the top of the table

Step 2: Select **Remove Rebate Assignment**



Step 3: The **Delete An Existing Corporation Rebate Assignment** form will appear. Select the **Corporation Rebate Assignment**

Step 4: Click **Delete**



App Features

Aside from adding, modifying and removing data within the Sysco Corporate Rebates app, you will find additional features that allow you to download, filter, search and sort the data within the Sysco Corporate Rebates app.

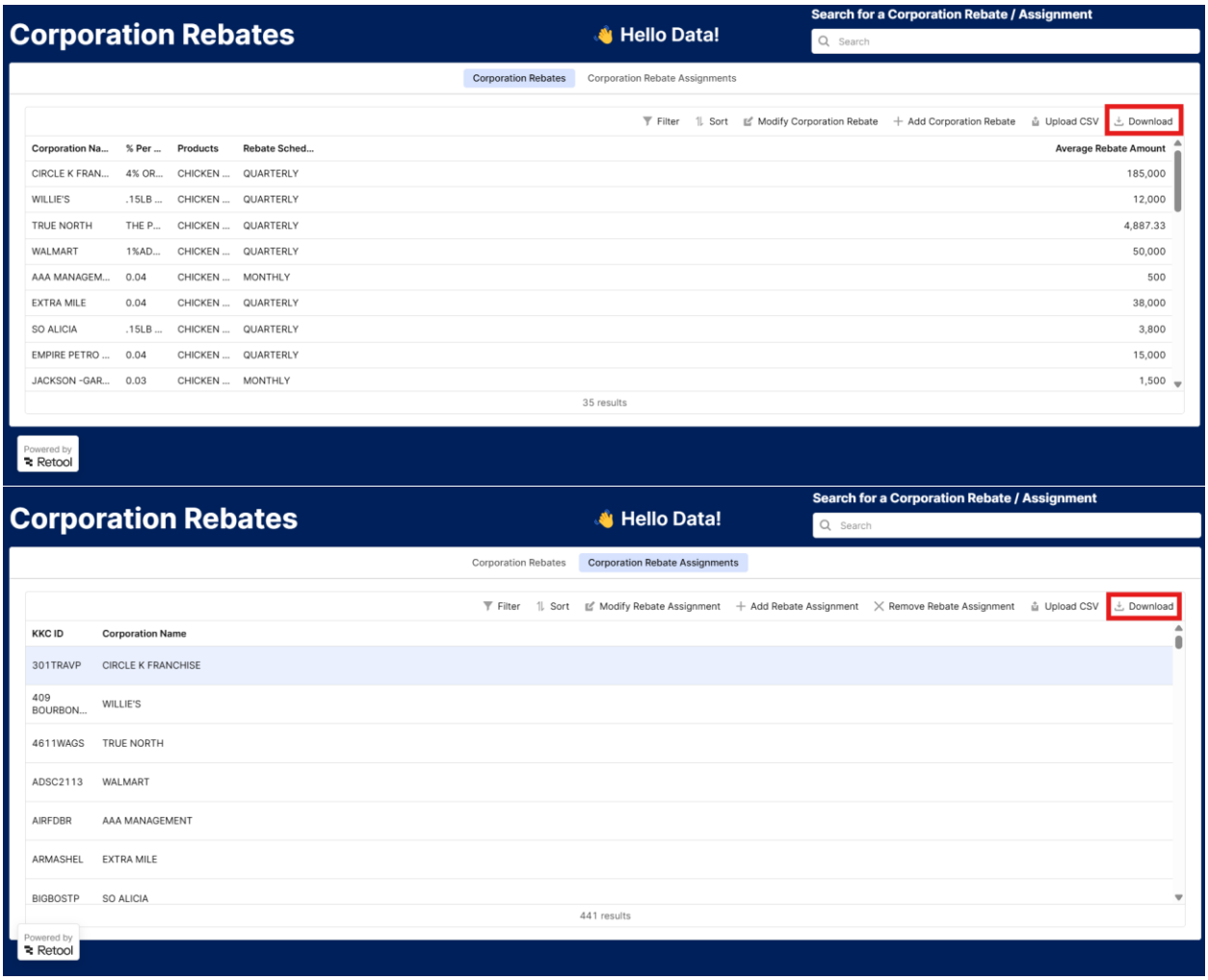
Download

To download the Corporation Rebates data or the Corporation Rebate Assignments data that is being utilized within the Sysco Monthly Rebate Dashboard, you can use the **Download** feature within the Sysco Corporate Rebates app, which downloads a csv file containing the entire dataset for either the Corporation Rebates data or the Corporation Rebate Assignments data.

Here is how to utilize the **Download** feature within the Sysco Corporate Rebates app:

Step 1: Select either **Corporation Rebates**, if you wish to download the corporation rebate data or **Corporation Rebate Assignments**, if you wish to download the corporation rebate assignment data, at the top of the table

Step 2: Select **Download**



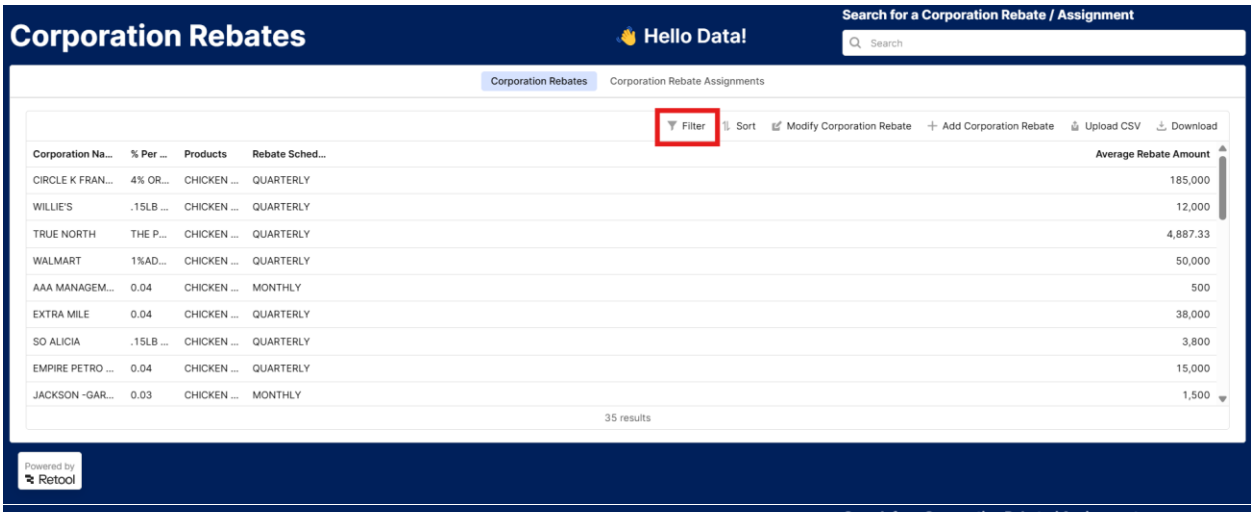
Filter

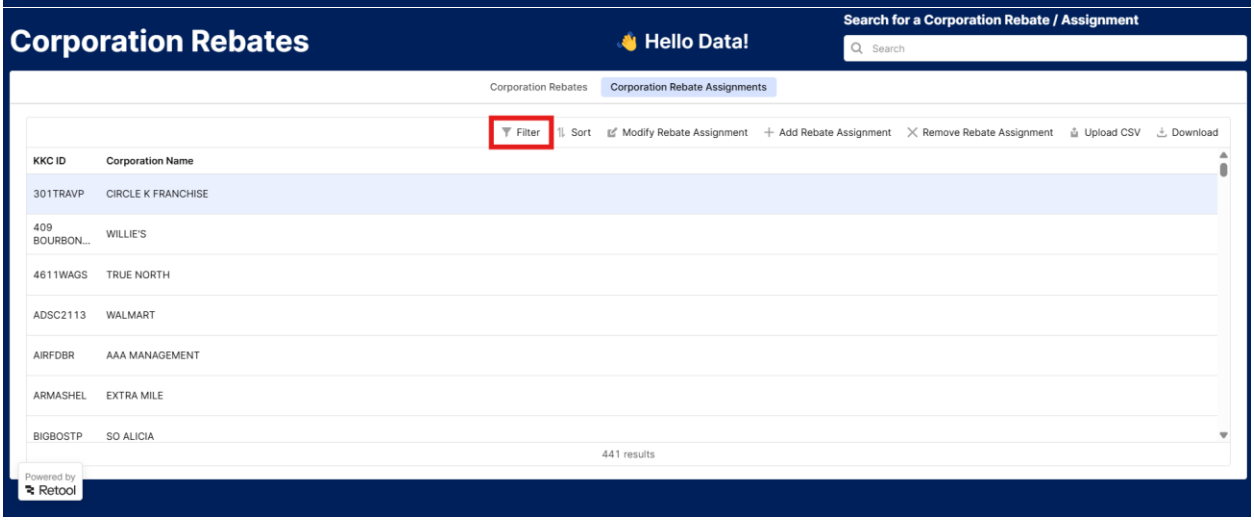
To filter the Corporation Rebates data or the Corporation Rebate Assignments data that is being displayed, you can use the **Filter** feature within the Sysco Corporate Rebates app, which filters the entire dataset for either the Corporation Rebates data or the Corporation Rebate Assignments data.

Here is how to utilize the **Filter** feature within the Sysco Corporate Rebates app:

Step 1: Select either **Corporation Rebates**, if you wish to filter the corporation rebate data or **Corporation Rebate Assignments**, if you wish to filter the corporation rebate assignment data, at the top of the table

Step 2: Select **Filter**





Search for a Corporation Rebate / Assignment

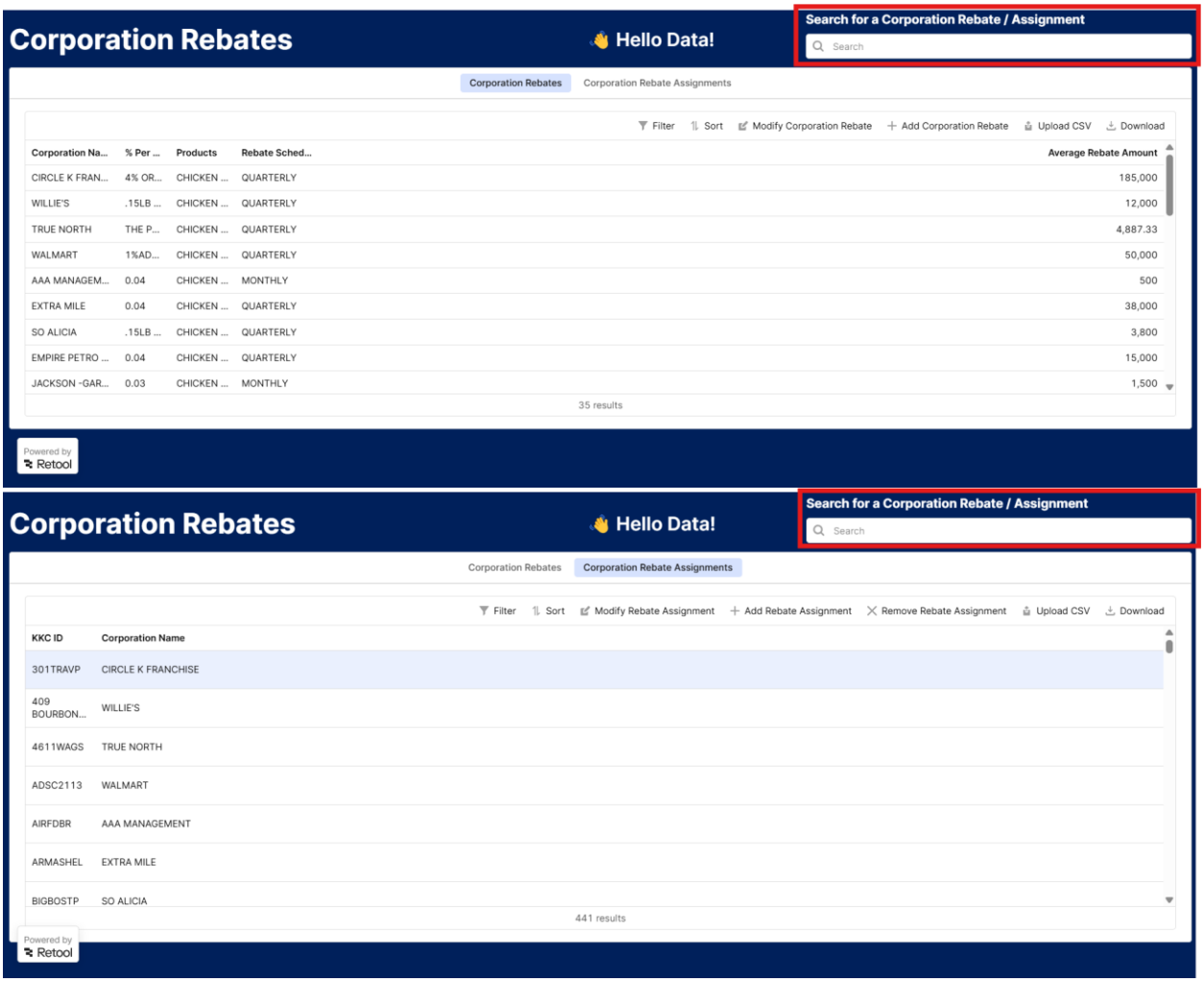
To search the Corporation Rebates data or the Corporation Rebate Assignments data that is being displayed, you can use the **Search** feature within the Sysco Corporate Rebates app, which searches the entire dataset for either the Corporation Rebates data or the Corporation Rebate Assignments data.

Here is how to utilize the **Search** feature within the Sysco Corporate Rebates app:

Step 1: Select either **Corporation Rebates**, if you wish to search the corporation rebate data or **Corporation Rebate Assignments**, if you wish to search the corporation rebate assignment data, at the top of the table

Step 2: Type the value that you wish to find within the desired dataset.

**** Note: The search bar searches for your value across all fields within the desired dataset*



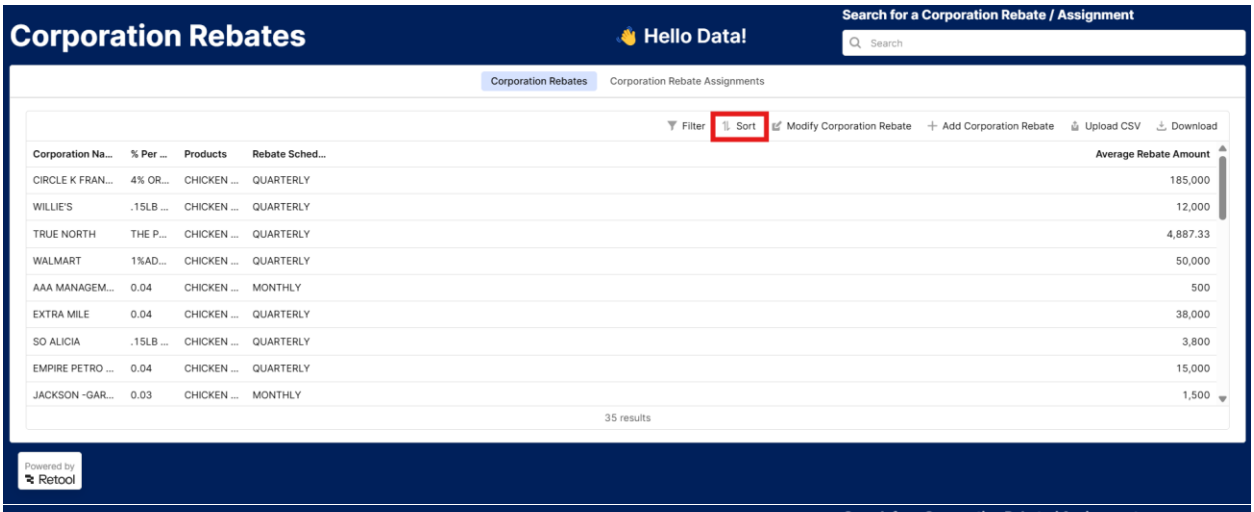
Sort

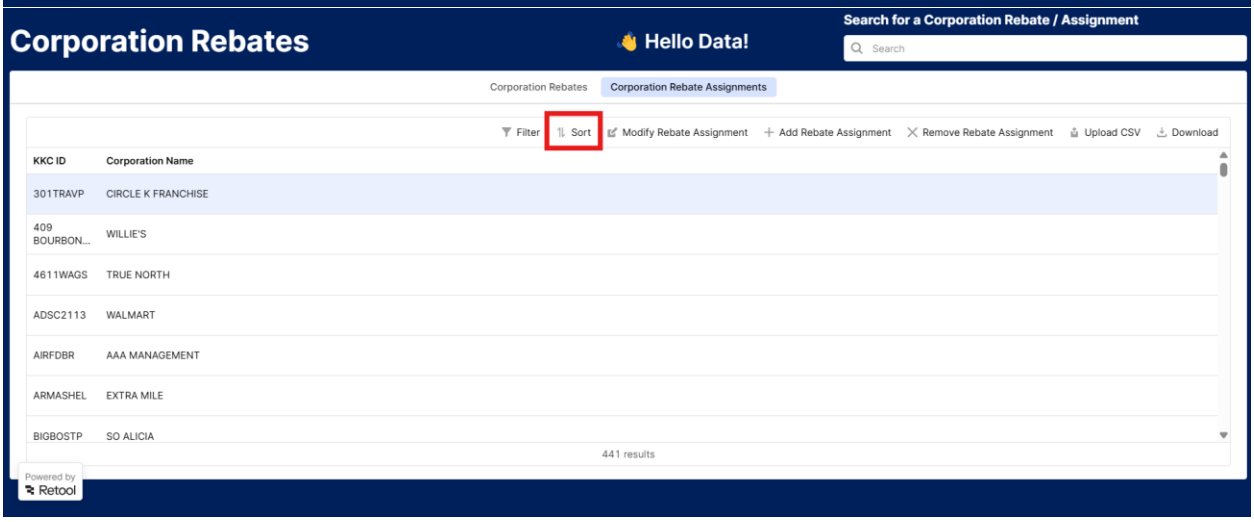
To sort the Corporation Rebates data or the Corporation Rebate Assignments data that is being displayed, you can use the **Sort** feature within the Sysco Corporate Rebates app, which sorts the entire dataset for either the Corporation Rebates data or the Corporation Rebate Assignments data.

Here is how to utilize the **Sort** feature within the Sysco Corporate Rebates app:

Step 1: Select either **Corporation Rebates**, if you wish to sort the corporation rebate data or **Corporation Rebate Assignments**, if you wish to sort the corporation rebate assignment data, at the top of the table

Step 2: Select **Sort**





Developer Notes

Changes to the Data

Any changes to the data, whether you add new records, modify existing records, or remove existing records, will **immediately** be shown within the Sysco Corporate Rebates app.

However, these changes will not be reflected within the Sysco Monthly Rebate Dashboard **until 3:00 AM EST the next day**.