

Table of Contents

Important Tips.....	1
Import Data	2
Reports.....	4
Generating Reports.....	4
Export to Excel	4
Send via Email	5
Schedule.....	6
Search and Edit.....	6
Add	6
Delete	6
People.....	7
Missing Emails	7
Add, Edit and Delete	7
Carbon Copy.....	8
Executives.....	9
Add	9
Edit and Delete	9

Important Tips

Importing Data



Always import the schedule first.

Schedule for different stores and programs can be imported at the same time. But sales data must be imported by store and program.

Supported Excel format: **XLSX**

Sending Reports



Always check for missing emails before sending reports via email.

Import Data

1. Click the area in Figure 2.1 to select a file or drag and drop a file to the area.
2. Click "Upload" to send file to server and proceed to next step. Or click "Cancel" to select a different file.
3. Choose sheet name.
*Make sure sheet name does not include spaces or special characters such as @, \$, %, *, etc.*
4. Select import type.
Note that when importing types other than "Schedule", another dropdown appears for choosing the program.
5. Click "Save" in Figure 2.2 to import the data. Or click "Cancel" to upload and import a different file.

Visuals

Figure 2.1

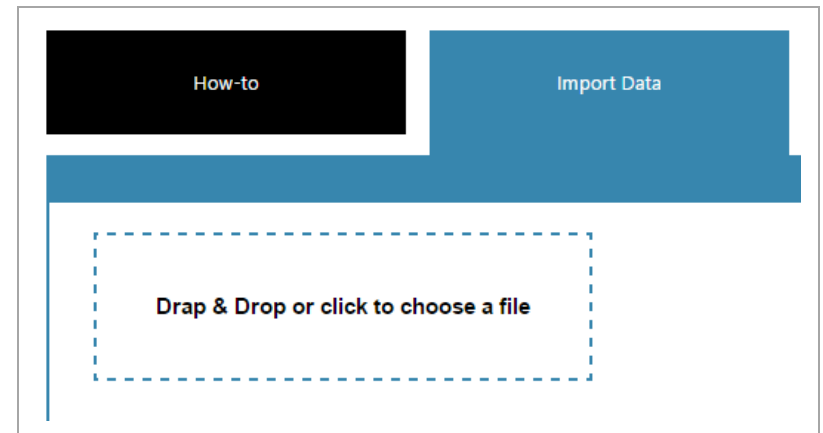
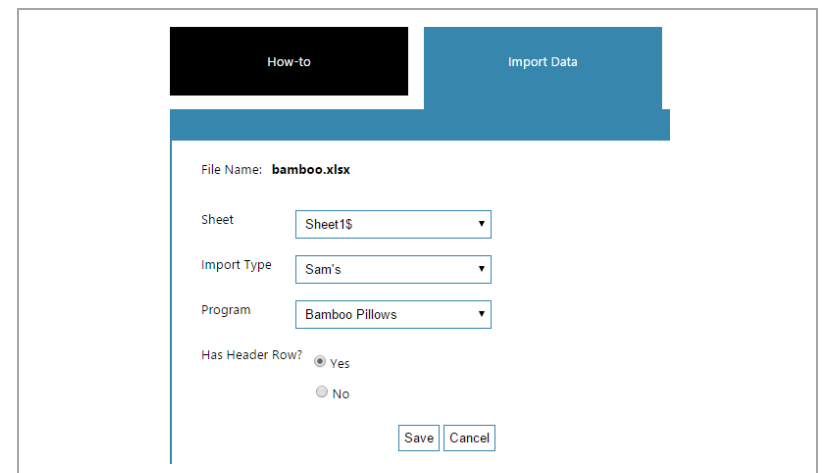


Figure 2.2



Import Data

- Once the import is complete, you will see a preview of what was imported.

See Figure 3.1

- If the imported data is correct, click "Save Import" in Figure 3.1. Or click "Undo Import" to import a different file.
Note that once an import is saved, it cannot be deleted.

Visuals

Figure 3.1

The screenshot shows a web application interface with a top navigation bar containing 'How-to', 'Import Data' (active), 'Reports', 'Schedule', and 'People'. Below the navigation bar, there are two buttons: 'Save Import' and 'Undo Import'. A message states '7469 records inserted.' Below this is a table with the following data:

Id	Program	SalesDate	StoreName	StoreNumber	ItemNumber	ItemName	Qty	UnitCost	ExtendedCost	ImportedBy	ImportedOn
137234	Bamboo Pillows	11/21/2014	Sams	4702	19299	QUEEN PILLOWS - 3PK BAMBOO PILLOW	0	0	0	Admin	12/05/2014
137235	Bamboo Pillows	11/21/2014	Sams	4703	19299	QUEEN PILLOWS - 3PK BAMBOO PILLOW	7	608.86	608.86	Admin	12/05/2014
137236	Bamboo Pillows	11/21/2014	Sams	4704	19299	QUEEN PILLOWS - 3PK BAMBOO PILLOW	9	782.82	782.82	Admin	12/05/2014
137237	Bamboo Pillows	11/21/2014	Sams	4710	19299	QUEEN PILLOWS - 3PK BAMBOO PILLOW	0	0	0	Admin	12/05/2014
137238	Bamboo Pillows	11/21/2014	Sams	4712	19299	QUEEN PILLOWS - 3PK BAMBOO PILLOW	0	0	0	Admin	12/05/2014
137239	Bamboo Pillows	11/21/2014	Sams	4721	19299	QUEEN PILLOWS - 3PK BAMBOO PILLOW	1	86.98	86.98	Admin	12/05/2014

Reports

Generating Reports

1. Select store
2. Select program

Note that stores and programs are pulled from the schedule. If a store or program is not on the dropdown list, then it is not on the schedule.

3. Select start date of rotation
4. Define length of rotation by number of days
5. Click "Generate" in Figure 4.1

Note that you can generate another report by clicking "New Report" in Figure 4.2.

Export to Excel

You can export summary, mix and all locations in one Excel file by clicking "Export All to Excel". Or export each tab individually by clicking "Export this Location to Excel".

See Figure 4.2.

Visuals

Figure 4.1

How-to Import Data Reports

Store:

Program:

Start Date:

Duration: days

Generate

Figure 4.2

How-to Import Data Reports

New Report Export All to Excel Send via Email

Location: #4704 FRESNO, CA [Export this Location to Excel]

Owner: Denise Michelle Neils Hub: Rosa Anguiano-Garcia

Quantity:

Item	Item Description	2014-11-11	2014-1
19299	QUEEN PILLOWS - 3PK BAMBOO PILLOW	17	
19300	KING PILLOWS - 3PK BAMBOO PILLOW	15	
Total		32	

Revenue:

Item	Item Description	2014-11-11	2014-1
19299	QUEEN PILLOWS - 3PK BAMBOO PILLOW	1479	
19300	KING PILLOWS - 3PK BAMBOO PILLOW	1350	
Gross Sale		2828	
Net Sale		2263	

Reports

Send via Email

Always go to "People" before sending emails and make sure everyone on the schedule has an email address.

Go to page 7 for more details.

1. Click "Send via Email" in Figure 5.1.
2. Make sure you fill out "Executive Details"
3. Click "Send"

Visuals

Figure 5.1

The screenshot shows a web application interface for generating reports. At the top, there are three tabs: 'How-to', 'Import Data', and 'Reports'. Below these, there are three buttons: 'New Report', 'Export All to Excel', and 'Send via Email'. The 'Send via Email' button is circled in red. Below the buttons, there is a form with the following fields: 'Store: Sams', 'Program: Bamboo Pillows', and 'Report Type: Daily'. Below these fields is a large text box labeled 'Executive Details:'. A red arrow points to this text box. At the bottom right of the form, there are two buttons: 'Cancel' and 'Send'. A red arrow points to the 'Send' button. At the bottom of the interface, there is a summary section with the following information: 'Sams', 'Program: Bamboo Pillows', 'Location: #4704 FRESNO, CA', 'Owner: Denise Michelle Neils', and 'Hub: Rosa Anguiano-Garcia'. There is also a link '[Export this Location to Excel]'.

Schedule

Search and Edit

You can find a record in the schedule by any of the column.

To edit a record, simply click the cell and start typing.

Note that changes are save as soon as a cell loses focus.

Add

To add a record to the schedule, click "Add" from the top menu (circled in Figure 6.1) and fill out all the fields.

Then click "Add" in Figure 6.2

Delete

To delete a record click on the red "X" at the beginning of the row.

Note that this action cannot be undone.

Visuals

Figure 6.1

How-to Import Data Reports **Schedule**

Add

Program: City:
Start Date: State:
End Date: Owner Firstname:
Store Name: Owner Lastname:
Store Number: Hub Firstname:
Hub Lastname:
Cancel Add

Search for in Search

	Program	Start Date (mm-dd-yyyy)	End Date (mm-dd-yyyy)	Store Name	Store Number	City	State	C
X	Hair	11-05-2014	11-21-2014	Sams	4856	Casa Grande	AZ	Brit
X	Hair	11-05-2014	11-21-2014	Sams	4938	Albuquerque	NM	Tyl
X	Hair	11-05-2014	11-21-2014	Sams	6219	COLORADO SPRING	CO	Col

Figure 6.2

How-to Import Data Reports **Schedule**

Add

Program: City:
Start Date: State:
End Date: Owner Firstname:
Store Name: Owner Lastname:
Store Number: Hub Firstname:
Hub Lastname:
Cancel **Add**

Search for in Search

	Program	Start Date (mm-dd-yyyy)	End Date (mm-dd-yyyy)	Store Name	Store Number	City	State	C
X	Hair	11-05-2014	11-21-2014	Sams	4856	Casa Grande	AZ	Brit
X	Hair	11-05-2014	11-21-2014	Sams	4938	Albuquerque	NM	Tyl
X	Hair	11-05-2014	11-21-2014	Sams	6219	COLORADO SPRING	CO	Col

People

Missing Emails

When you go to "People", the app will notify you if there are any owners on the schedule that don't have an email address (Figure 7.1).

These people are highlighted in red as seen in Figure 7.2.

Always check "People" before sending emails.

Add, Edit and Delete

To add a new person, click "Add Email" in Figure 7.2, fill in their information and click "Add".

To Edit someone, simply click the field you want to update and type. Changes are saved as soon as a field loses focus.

To delete someone, click the red "X" next to their name.

Visuals

Figure 7.1

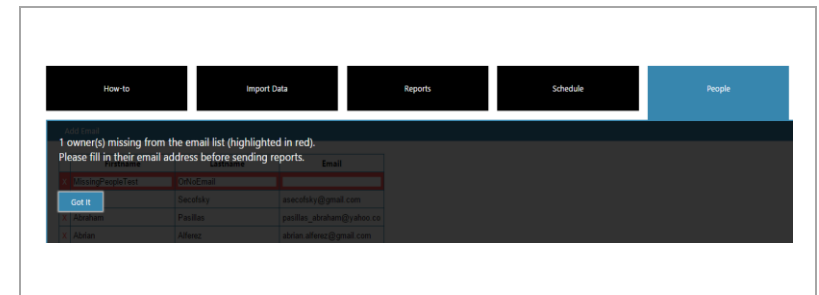
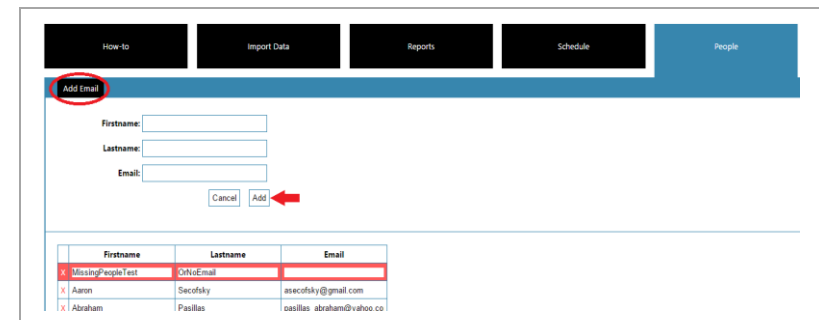


Figure 7.2



Carbon Copy

“Carbon Copy” is the email distribution list.

You can manage each person’s CCs for sending reports via email.

Anybody added to “People” will automatically show up in “Carbon Copy”.

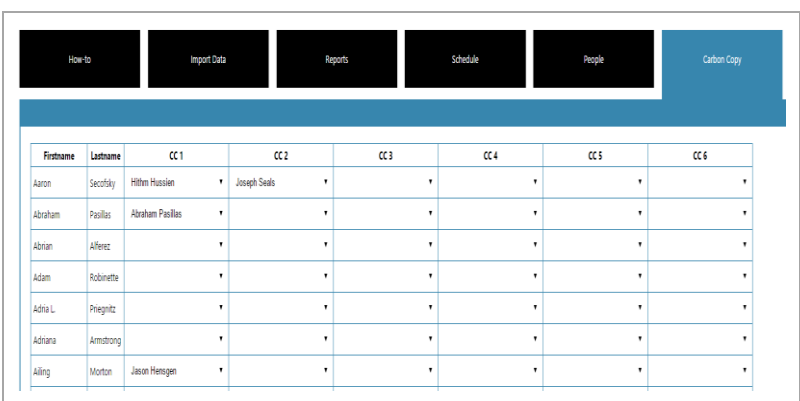
Once someone is deleted from “People”, they will also be removed from “Carbon Copy” and anybody’s CCs.

To update CCs, simply click on the dropdown and select.

Note that CC dropdowns are also pulled from “People”.

Visuals

Figure 8.1



The screenshot shows a web application interface with a navigation bar at the top containing buttons for 'How-to', 'Import Data', 'Reports', 'Schedule', 'People', and 'Carbon Copy'. The 'Carbon Copy' button is highlighted in blue. Below the navigation bar is a table with columns for 'Firstname', 'Lastname', and six 'CC' columns (CC 1 through CC 6). Each cell in the table contains a name and a small downward arrow indicating a dropdown menu.

Firstname	Lastname	CC 1	CC 2	CC 3	CC 4	CC 5	CC 6
Aaron	Secorisky	Willem Hussien	Joseph Seals				
Abraham	Psallias	Abraham Psallias					
Abrian	Alfercz						
Adam	Robinette						
Adria L.	Priegnitz						
Adriana	Armstrong						
Ailing	Morton	Jason Hensgen					

Executives

Add

1. Click "Add Executive" in Figure 9.1
2. Select the person from the first dropdown
Note that this dropdown is pulled from "People".
3. Select the program they are the executive of
Note that this dropdown is pulled from "Schedule".
4. Click "Add"
Note that you have to add the executive for each program that applies. If person A is an executive of programs B and C, you have to add person A twice, once for program B and once for program C.

Edit and Delete

To edit what program an executive who is already on the list should be assigned to, simply pick the program from the dropdown in the list.

To remove someone from the executive list, click on the red "X" next to their name.

Visuals

Figure 9.1

Firstname	Lastname	Executive of
Alexis R.	Spence	KingEc
Andrew	Hawth	L.Ames