SR Incentives

Manager Training

We're excited to launch *Reach New Heights*, our second incentive app.

We've designed this app to be intuitive and easy to navigate, but please also review this training document and video to ensure you're set up for success. We'll show you how it works, and what to do if something doesn't work exactly as expected.

But first, make sure you:

Register yourself and your team. If you previously registered for *FirstLook*, you're already registered for *Reach New Heights.* If you are new to the *Spectrum Reach Incentives* app (previously *Firstlook*), you will need to register by clicking the *SR Incentives* link below. Don't skip this step. If you aren't registered, you won't have access. If someone on your team is not registered, you won't see their name displayed in your *Manager Viewport* on the *Standings* page, and you won't have access to input their sales numbers.
Register Now >

Use Your Administrator Access to set AE goals and add qualified sales data to your team's individual profiles. Currently, LSMs and up have administrative access. If you intend to delegate your team's data input responsibility to another individual, you will also need to provide that person with your manager username and password. We will not be adding administrative access to any other users at this time.

Go to: www.srincentives.com

Log-in with your username and password. If you've forgotten your password or still need to register, use the links provided on the log-in page.

After logging in successfully, you'll be at the *Launchpad*. From here, you are able to access all of your active incentives. Now that you're in, the first thing we need to do it verify yourself and your team:

- Click on the *Reach New Heights* card on the right side of your screen. This routes you to the *Reach New Heights-Standings* page.
- Beneath the *Collective Goal* you will see your personal *Dashboard*. Check your information for accuracy.
- Next, in the lower portion of your *Dashboard*, you will see the individuals that report to you directly. Be sure everyone on your team is there. If not, click the link to contact support.

Check out the *Admin* page to see how easy it is to set AE goals and to add approved sales numbers for this incentive.

- Scroll up to the top of the page; in the left-hand corner you'll see the *SR Incentives* logo. Click "Admin."
- Then, select your division. This populates the spreadsheet with all sales associates within that division.
- Assuming you are an LSM, type your name into the *Search Manager* filter to isolate your team.
- Next, please notice the blue *Edit* button off to the right side of each row. Click the edit button to activate the row. Now you can enter data in a very familiar way by either clicking each box or using tab to navigate to the next one.
- If for some reason you cannot find someone you believe is registered, please contact support.

IMPORTANT NOTE- When entering financial data:
- DO NOT USE "$" (dollar signs)
- DO NOT USE "," (commas)
- DO NOT USE "." (periods)

For example, if the amount is $30,000.00, input the financial data in this format only: 30000
Once saved, it will display in your *Dashboard* properly.

As sales are made, you'll need to come back to the *Admin* page and add the dollar amount of the contract, update the number of contracts sold, and update the name on the contract for cross reference verification.

Finally, hit the *Save* button, and you're done. The database is updated in real-time, so if you want to add info as it comes in or you choose to do it once a week, the info will be reflected instantly.

Let us know if you need additional support.

Sincerely,
The SR Incentives App Team