# Merchandiser Training Manual

Welcome to Driveline

---

## Table Of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOW TO ACCESS THE SMARTPROJECT MERCHANDISER PORTAL</td>
<td>3</td>
</tr>
<tr>
<td>PORTAL LINKS &amp; ALERTS</td>
<td>5</td>
</tr>
<tr>
<td>MERCHANDISER PROFILE</td>
<td>5</td>
</tr>
<tr>
<td>REVIEW SCHEDULE</td>
<td>9</td>
</tr>
<tr>
<td>FORMS DEPOT</td>
<td>10</td>
</tr>
<tr>
<td>BULLETIN BOARD</td>
<td>10</td>
</tr>
<tr>
<td>TRAINING</td>
<td>11</td>
</tr>
<tr>
<td>EXTERNAL LINKS</td>
<td>15</td>
</tr>
<tr>
<td>USER LOGIN</td>
<td>15</td>
</tr>
<tr>
<td>ALERTS SECTION</td>
<td>17</td>
</tr>
<tr>
<td>MERCHANDISER 30-DAY SCHEDULE PAGE</td>
<td>17</td>
</tr>
<tr>
<td>SCHEDDATE</td>
<td>18</td>
</tr>
<tr>
<td>PROJECT ID / PROJECT</td>
<td>20</td>
</tr>
<tr>
<td>DOCS</td>
<td>20</td>
</tr>
<tr>
<td>STORENO / STORE / ADDRESS / CITY / STATE</td>
<td>21</td>
</tr>
<tr>
<td>MINUTES / LEAD</td>
<td>21</td>
</tr>
<tr>
<td>NOTE</td>
<td>21</td>
</tr>
<tr>
<td>PRE-VISIT TASKS</td>
<td>23</td>
</tr>
<tr>
<td>DETAILS</td>
<td>26</td>
</tr>
<tr>
<td>REPORTING A PROJECT</td>
<td>28</td>
</tr>
<tr>
<td>TYPES OF FORMS</td>
<td>30</td>
</tr>
<tr>
<td>PHOTO UPLOAD</td>
<td>32</td>
</tr>
<tr>
<td>UPDATE PAYROLL</td>
<td>36</td>
</tr>
<tr>
<td>CLOSEOUT</td>
<td>38</td>
</tr>
<tr>
<td>COMPLETED TAB</td>
<td>39</td>
</tr>
<tr>
<td>COMPLETING A CERTIFICATION</td>
<td>39</td>
</tr>
<tr>
<td>TROUBLESHOOTING SECTION</td>
<td>43</td>
</tr>
<tr>
<td>Cannot Log In To Driveline System</td>
<td>43</td>
</tr>
<tr>
<td>Forgot My Password</td>
<td>44</td>
</tr>
<tr>
<td>Cannot Print Work Orders or Documents...Rep cannot open plan documents in V3</td>
<td>44</td>
</tr>
</tbody>
</table>
At Driveline®, we provide brands, manufacturers and retailers with the highest quality retail merchandising services available. That's not just a goal. Quality performance is embedded in our culture, from management to our 14,000 strong certified W2, permanent employee field force. We use a unique process that individually assigns the most qualified merchandisers and project managers to every job. Once the merchandising team is chosen, we put our proven workflow into action to deliver results with unbeatable speed-to-market. We complete projects in just days, not weeks and we make sure not interfere with store activities by verifying accurate completion through our advanced, proprietary RetailGIS® SmartSystem™ technology.

Driveline's merchandising services team is national, but we can deploy locally from coast to coast. We service national and regional chains, covering more than 80,000 retail doors across the country. Driveline gets customer products and programs to market when they need them there. We are trusted by leading brands, manufacturers and retailers to provide the absolute best-in-class resources and technology. Our innovative ideas and unique approach ensure we deliver consistently and confidently.

This Merchandiser Training Manual reviews the functionalities of the Smartproject Merchandiser Portal.

**HOW TO ACCESS THE SMARTPROJECT MERCHANDISER PORTAL**

To access the Driveline website, go to [www.drivelineretail.com](http://www.drivelineretail.com). We recommend bookmarking this web page on your computer for quicker access.

The following window appears:

[Image]

Hover over LOGIN, and select/click the DL Team Login option.

Enter your Username. Your personal e-mail address is your Username. Enter your password. This is auto-generated and sent to your email address when hired. Click the 'Submit Login Data' button.

The **SMARTPROJECT MERCHANDISER PORTAL** home window appears:
● **PLEASE NOTE THE FOLLOWING:**
  ○ In the **RED** section at the top of the page: ‘SmartProject Merchandiser Portal’ can be clicked on to re-load the page
  ○ Anything that is **UNDERLINED** is a link to another section

**PORTAL LINKS & ALERTS**

In the red bar at the top of the page, next to ‘SmartProject Merchandiser Portal’, are links to additional functions/tools:

- **MERCHANDISER PROFILE**
- **REVIEW SCHEDULE**
- **FORMS DEPOT**
- **BULLETIN BOARD**
- **TRAINING**
- **EXTERNAL LINKS**
- **USER LOGIN**

**MERCHANDISER PROFILE**

Click on the **MERCHANDISER PROFILE** link to open the SmartProject Field Associate Profile Maintenance screen:

- **ASSOCIATE INFO & SCHEDULING / RANKING INFORMATION** (completed/updated by the District Manager)
2) **MERCHANDISING WORK REQUIREMENTS** (completed by the Merchandiser)

<table>
<thead>
<tr>
<th><strong>MERCHANDISING WORK REQUIREMENTS:</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>LIFT 25LBS/REPEATEDLY:</td>
<td>YES</td>
</tr>
<tr>
<td>ARE YOU WILLING TO CLIMB &amp; WORK FROM LADDER:</td>
<td>YES</td>
</tr>
<tr>
<td>AVAILABLE FOR WEEKEND WORK:</td>
<td>YES</td>
</tr>
<tr>
<td>EXPERIENCE READING RETAILER PLANS:</td>
<td>YES</td>
</tr>
<tr>
<td>SMALL TOOLKIT ACCESS (SPERM/KIT/HANDY)</td>
<td>YES</td>
</tr>
<tr>
<td>CAPABLE OF OPERATING SMALL POWER TOOLS:</td>
<td>NO</td>
</tr>
<tr>
<td>YEARS OF EXPERIENCE:</td>
<td>10</td>
</tr>
<tr>
<td>DO YOU SPEAK SPANISH:</td>
<td>NO</td>
</tr>
<tr>
<td>DO YOU HAVE RELIABLE TRANSPORTATION:</td>
<td>YES</td>
</tr>
</tbody>
</table>

3) **TECHNOLOGY REQUIREMENTS** (completed by the Merchandiser)
4) HEAVY RESET SERVICES WORK REQUIREMENTS (completed by the Merchandiser)

Merchandisers complete and maintain the SCHEDULE AVAILABILITY section, which indicates the days and hours you are available to work.

Driveline schedules your projects according to the SCHEDULE AVAILABILITY you enter in your Profile. If your availability changes, you must update the SCHEDULE AVAILABILITY section immediately (keep your availability current at all times).

Please keep your District Manager informed of any changes made to your availability/profile.
Click on the REVIEW SCHEDULE link to open the 'RetailGIS® Schedule By Day For Next 30 Days' screen

- A summary-by-day of your assigned work for the next 30 days opens:

- Click on the + (plus) sign to view each day's details
Click the FORMS DEPOT link to access a listing of available company forms. ● Click on either the form’s description or file name to open the document, where you can then download/print it.

➢ BULLETIN BOARD

Click the BULLETIN BOARD link to access important messages/updates, and to purchase company clothing.

➢ TRAINING

Click the TRAINING link to access available training subject links

- REVIEW TRAINING
  ➔ This section provides training/access to:
-DOWNLOAD TRAINING

 ➔ This section provides direct access to the Merchandiser Training Manual:

(User can view/print document)

- MOBILE TRAINING

 ➔ This section provides training/access to the Mobile App training materials:

(By clicking on the different options, you can access the Mobile App Training Guide, and go through an interactive demo for the Mobile App. If you are viewing this via your mobile device, you can download the SmartPM Mobile App)

-CERTIFICATIONS

 ➔ This section provides access to CERTIFICATIONS that you will need to complete. Certain retailers require Merchandisers to be ‘certified’ before working on their projects. Here you will find Certification material (i.e., training manuals and videos) for certain retailers and their programs. Each Certification requires successful completion of a Certification test.

(contact your District Manager for specific directions on which certifications to take first):
- PHOTO UPLOAD TEST
  ➔ This section allows you to test uploading a photo so you know if you have the correct system requirements/updates:
  
  - Click the 'Add More Files' button, select a photo from your computer, and click 'Open'
  - Once you see the selected photo (like the example above), click the 'Upload' button

  ➔ If you are successful, you will see the screen above - if not, please contact your District Manager and/or IT Help Desk

- EXTERNAL LINKS
Click the EXTERNAL LINKS link to access program-specific hyperlinks:

- The example above, when the blue link is clicked on, takes you to a client-maintained page that shows tracking information

➢ USER LOGIN

Click the USER LOGIN on the right of the screen to access additional features:

-PAYROLL DETAIL
➢ This feature allows you to access details of your paychecks, for current and past pay periods.

-CONTACTS
➢ This feature allows you to view/contact your area managers, as well as corporate support departments. Simply click on the blue link to send a message.

- Your District Manager should always be your first point-of-contact.
LOGOUT

➔ Click this to exit the SmartProject Merchandiser Portal

ALERTS SECTION

This section provides a 'quick-view' to the overall status of your assigned projects:

- **Unconfirmed Visits Next 7 Days**: this shows the number of assignments you are scheduled for over the next 7 days that you have not confirmed acceptance for.
- **Past Due Visits**: this shows the number of ‘late’ visits that have not been reported yet.
- **Photos Incomplete**: this shows the number of reported visits that have not had the required photos uploaded yet.
- **Payroll Incomplete Visits**: this shows the number of reported visits that have not had the payroll process fully completed yet by the merchandiser.

MERCHANDISER 30-DAY SCHEDULE PAGE

~Incomplete Tab~
Your 30-Day Schedule page has many features and functions to help you manage your work. Most headers can be sorted by clicking on them. Underlined items can be clicked on to access further screens. The following sections will breakdown each Header Item to provide more details:

SCHEDDATE

➔ This sortable column is grouped first by-week, then by-day

● Dates in **RED** are late/overdue
● Dates in **YELLOW** are due today/tomorrow
● Dates in **WHITE** are scheduled 2-or-more days out

If a Project SCHEDULE DATE is written in **blue font**, the Merchandiser **may** change the SCHEDULE DATE. If a Project SCHEDULE DATE is written in **black font**, the Merchandiser may **NOT** change the SCHEDULE DATE. These are called **Hard-Dated** projects.

**Examples:**

![Flexible](image)

**FLEXIBLE**

- 01-Jan-2018
- 03-Jan-2018
- 04-Jan-2018

![Hard-Dated](image)

**HARD-DATED**

- 02-Jan-2018
- 06:45:00 AM
- 02-Jan-2018
- 06:45:00 AM

***If you are not able to accept a project on your schedule, whether Flexible or Hard-Dated, contact your District Manager immediately, so the project can be reassigned.***

➔ **CHANGING A SCHEDULE DATE**

● To change a SCHEDULE DATE, first click on the **blue-colored** date
The FIELD SCHEDULE MAINTENANCE UTILITY window opens:

Complete the following steps to change the date:

- Click the 'NEWSCHEDULE DATE' dropdown and select the new date (only available dates per project parameters will be accessible)
- Click the 'RESCHEDULEREASON' dropdown and select the most applicable reason for the change
- In the 'COMMENTS' section, type in any notes relevant to the schedule date change
- Finally, click the 'SUBMIT RESCHEDULE INFORMATION' button to complete the date change

PROJECT ID / PROJECT

- Both columns are sortable by number or name
- Each Project is assigned a unique Project ID number. All Driveline departments reference projects by Project ID numbers. You will need this ID number before, during, and oftentimes after project completion. Any verbal or written communication about a particular project, should reference the Project ID.
- Each Project is also assigned a specific name. For example, the TEST PROJECT- MULTIPLE POGS 2018 project.
**DOCS**

- This header is a direct link to all attached project support documents (i.e.: instructions, planograms, Letter of Authorizations, reference pictures, guides, videos, some forms, Leave Behind materials, etc.).

- Click on the blue **DOCS** link to the right of the PROJECT NAME

- All assigned materials will become accessible for you to open/view/print by clicking on the blue **REVIEW** link

- Materials attached under the RETAIL TRAINING MANAGEMENT section apply to the **PROJECT** in general, and materials attached under the RETAIL PLANOGRAM SPECIFIC DOCUMENTS section apply only to those stores assigned to a **SPECIFIC POG (PLANOGRAM)**.
  - **ALL** of the materials shown apply to the **STORE** that you opened the docs for.

**STORENO / STORE / ADDRESS / CITY / STATE**

- These columns provide information for the assigned store:
  - **STORENO**: the number assigned to the store and how Driveline identifies the location
  - **STORE**: the name of the location (Retailer - Banner/Division - Number)
  - **ADDRESS / CITY / STATE**: the physical street location of the store/building

**MINUTES / LEAD**

- These columns provide information re: assigned time and if you are the Team Lead or a Helper.
  - The **MINUTES** column displays the number of minutes allotted to perform the project. We conduct Time & Motion studies to determine the timing to complete different types of projects. This information is also found on the Work Order and in the In-Store Instructions.

  - The **LEAD** column has two designations - "Y" for **YES** and "N" for **NO**.

  - On some projects, you are part of a team. On other projects, you work alone.
  - A "Y" indicates you are the Team Leader for the project. Team Leader duties include: **Processing the Work Order**, **Uploading project photos**, and **Updating project payroll** for all members of the project team.
  - An "N" indicates you are not the Team Leader.
If you work on a project **alone**, you should be the LEAD, and a "Y" designation should be indicated.

- Contact your District Manager if an "N" appears.

**NOTE**

→ This column provides quick-view information to help you become instantly familiar with several possible key requirements for a project.

***There are currently 3 possible notations that could appear in the NOTE column
(There could be more than one note showing for a project)***

- COMPONENTS- these are typically small merchandising materials needed for a project. They are shipped either to the store or to your home. InStore Instructions will guide you on the use and setup of Components.
- CHECKIN REQD- this indicates that- upon arrival at the store- you or the Team Lead are required to call our Check-In Interactive Voice Response (IVR) system. In Store Instructions will guide you.

If you are the Team Lead, and have a project that displays CHECKIN REQD under the NOTE column, call the IVR System upon arrival at the store @ **1-888-654-5618**.

✓ Select prompt '2' for Check In.
✓ Enter the **Project ID** number
✓ Enter the **Order Control** number
✓ Enter your **Associate ID** number. ONLY the Team Lead’s number will be accepted
✓ Enter the **Total Driveline Reps In Attendance. Include yourself in the total.**
✓ Once complete, you will hear the following message: “Please wait while we validate your entries”. If your entries are correct, you will hear: “Your information has been submitted”. If not, you will be redirected to the beginning to re-submit your entries.

- TEAM- if the project-store has more than one merchandiser assigned, then you will see ‘TEAM’ in the NOTE column. You will be able to see the additional merchandisers and their contact information on the actual Workorder.

**PRE-VISIT TASKS**

→ This column shows you critically important tasks that must be done in order to begin and continue the visit process.

- These tasks are listed in order from top-to-bottom and need to be completed in order (the first will be underlined in blue, then once completed, the next will be underlined, and so on).

***There are currently 3 types of PRE-VISIT TASKS that you will see***

- CONFIRM COMPONENT RECEIPT- If Components were indicated in the previous NOTE column, the Merchandiser will see the **red CONFIRM COMPONENT RECEIPT** link in the PRE-VISIT TASKS column.
Once **Components** are received or receipt is verified with store management, click the **red CONFIRM COMPONENT RECEIPT** link.

The FIELD FIXTURE RECEIPT TRACKING & CONFIRMATION UTILITY window opens:

Click here to indicate receipt of project shipments

The **CONFIRM COMPONENT RECEIPT** link then changes to RECEIVED COMPONENT in **black**.

- **UNCONFIRMED VISIT** - this task applies to every project/store that you will be assigned to.
  - This task only becomes available (as indicated by being underlined in blue) if all prerequisite tasks are completed.
  - Click the **red UNCONFIRMED VISIT** link to accept/confirm the assigned work.
    - **UNCONFIRMED VISIT** link then changes to **CONFIRMED VISIT** in **black**.

The PROJECT ASSIGNMENT CONFIRMATION UTILITY window opens:

Review the **TERMS OF WORK ACCEPTANCE** at the bottom of the screen, and then click the **CLICK HERE TO CONFIRM ACCEPTANCE** button:

(you can also change the Schedule Date from here if it is blue)

The **UNCONFIRMED VISIT** link then changes to **CONFIRMED VISIT** in **black**.
Projects can be loaded into the system daily. Check your portal page daily to confirm recently-added projects.

- ENTER PRECALL: (this changed from PRECALL REQUIRED once you confirmed the work)
  - This task applies if you / Team Lead are required to make a PRECALL to the store prior to your visit. Refer to the project instructions or Precall Script (if provided) on what the Precall Requirements are.
  - This task only becomes available (as indicated by being underlined in blue) if all prerequisite tasks are completed.

  - Click the red ENTER PRECALL link to start the process.

The PROJECT PRECALL MANAGEMENT ADD window opens, with Store contact information:

- After completing the Precall with Store personnel, complete the PRECALL DETAIL ENTRY section
- In the **Contact Name** field, enter the name of the Store personnel you spoke with.
- In the **Contact Position** field, click the drop-down arrow and select the person’s position.
- Enter any applicable comments in the **Comments** section.

After completing the PROJECT PRECALL MANAGEMENT ADD window, click the SUBMIT PRECALL INFORMATION button.

The ENTER PRECALL link then changes to REVIEW PRECALL in blue, allowing you to review/update any information.

**DETAILS**

- This column is where you will access the actual WORKORDER once all Pre-Visit Tasks have been completed.

The **WorkOrder** is one of the most important documents that you will work with. It contains - or links to - all pertinent information needed for a Project.

To view project documentation prior to confirmation, click the blue DOCS link under the DOCS column of the Merchandiser 30-Day Schedule screen.
The WORKORDER is available once you see **X ENTER WORKORDER** in blue.

- Click on the blue **X Enter WorkOrder** to access.

The PROJECT DETAIL INFORMATION window opens. This window is referred to as the **WorkOrder**:

![WorkOrder screenshot]

**NOTE:** Some projects require additional forms to be completed (i.e., **Inventory, Out-of-Stock, Returns & Order** forms). These forms print automatically when you print the WorkOrder. While in the store, take **Inventory, Out-of-Stock, Returns & Order** counts manually on these forms. You will transfer these counts to electronic versions of these forms when you ‘report’ the project as complete.

The **Work Order** contains:
- PROJECT ID, STORE ID, ORDER ID
- STORE ADDRESS & TELEPHONE NUMBER
- PROJECT DESCRIPTION
- SCHEDULE DATE
- TOTAL TIME
- PROJECT TRAINING MATERIAL
- PLANOGRAM ID LINK
- PHOTO REQUIREMENT COUNT

The WorkOrder also links to Planogram specific materials, such as schematics, instructions, etc. This is also available under **DOCS**.

Click the **blue link** under the **PLANO** header to access Planogram-specific materials:

![Planogram screenshot]

The WorkOrder also includes the **PROJECT TRAINING MATERIAL** section, where you can access Training Materials needed for the project. Each document will be listed by name:

![Training Materials screenshot]

To the right of each document name is **MUST PRINT** or **MUST REVIEW**.
Click the **REVIEW** link to access/print applicable Training material.
REPORTING A PROJECT

After completing the actual visit to the store, log into the SMARTPROJECT MERCHANDISER PORTAL to report your project visit as complete on the same day as the store visit.

On the WorkOrder screen, click the UPDATE link under the STATUS header:

This WorkOrder opens, allowing access to data input:
Each WorkOrder is unique to each project.
- Respond to all questions. Enter applicable comments.
- Many projects require additional forms (Inventory, Out Of Stocks, Orders, Returns) be completed before the WorkOrder questions can be answered/submitted.
- If additional forms are required, they printed with the WorkOrder.
- Enter Inventory, Out Of Stocks, Orders, Return counts via the red links at the top left of the screen.
- If data entry errors occur, contact your District Manager to have the WorkOrder reset.

Click SUBMIT WORKORDER to upload your data.

After clicking SUBMIT WORKORDER, the WORK ORDER SUBMISSION CONFIRMATION window opens with a confirmation number:

Write this confirmation number on your WorkOrder paperwork, and retain for at LEAST 90 days.

To return to the Work Order click the blue CLICK HERE FOR PROJECT HOMEPAGE link.

TYPES OF FORMS
Inventory: Used to capture on-hand inventory for designated items. Must have each line-item completed, using the dropdowns (no override or by-pass option):

Once completed, click the ‘Submit Inventory’ button at the bottom of the screen:

Out of Stock: Used to capture items that are considered Out-of-Stock based on pre-determined criteria that is documented in Project Instructions. Click the applicable boxes for each Out-of-Stock Item:

- If you do not have Out-of-Stock items, or encountered an issue during your visit that prevented you from capturing the data, select the reason by clicking the SELECT A REASON FOR NOT REPORTING OOS dropdown. Click the SUBMIT REASON button.

Click the SUBMIT OUT OF STOCK button at the bottom of the screen to submit your data.

Order: Used to place orders for product, signage/POP, fixture parts, etc. Select the order quantity for each item by using the dropdowns at the right of the page. Once the items are selected, click SUBMIT ORDER at the bottom of the window:

Order: If you do not have items to be ordered or were prevented from capturing data during your visit, select a reason by clicking the SELECT A REASON FOR NOT REPORTING A ORDER dropdown. Click the SUBMIT REASON button:
Click **SUBMIT ORDER**.

**Returns**: Used to record counts of items that are damaged, returned, destroyed, or discarded (depending on the project). Select the number being returned for each item using the dropdowns at the right of the page:

- Once all data is entered, click **SUBMIT RETURNS** at the bottom of the window:

**Returns**: If you do not have items to be returned, or were prevented from capturing the data during your visit, select the reason by clicking the **SELECT A REASON FOR NOT REPORTING RETURNS** dropdown:

- Click the **SUBMIT REASON** button.

**PHOTO UPLOAD**

The **PHOTO UPLOAD** link appears on the WorkOrder window, after completion and submission of the WorkOrder's questions and any form data. Most Driveline projects require at least one Digital photo be taken and uploaded to our system. We recommend logging and tracking your photos to facilitate identification after uploading to your computer. You may complete several projects in different retail stores in a single day, and you must be able to accurately match each photo with each project/store:
● Click PHOTO UPLOAD.

The SMARTPROJECT DIGITAL IMAGE MANAGEMENT window opens:

1. Click on the 'Add More Files' button
2. Click on a folder/file where photos are stored
3. Click on a photo(s)...the photo(s) will highlight
4. Click the OPEN button at the bottom-right of the window

FOLLOW THESE STEPS TO SELECT / UPLOAD PHOTOS
5. It is IMPERATIVE that the photos being uploaded are ORIENTED correctly so they can be easily viewed.
   - Hover near the image to reveal the Tools options
   - Click on the center icon (ROTATE) until the image is oriented correctly

6. Click the UPLOAD button at the bottom-right of the window:

7. The SMARTPROJECT DIGITAL IMAGE PLANOGRAM ASSIGNMENT MANAGEMENT window opens:
8. Click SUBMIT IMAGE PLANOGRAM CONFIRMATION button.

9. The SMARTPROJECT DIGITAL IMAGE UPLOAD CONFIRMATION window opens:

10. Write the red Confirmation ID Number on the WorkOrder and retain for at least 90 days.

11. Close the Confirmation window by clicking the CLOSE WINDOW link at the top/center of the window.

**UPDATE PAYROLL**

After successfully uploading a photo and receiving confirmation of photo upload, the system now allows you to **UPDATE PAYROLL**.
• Click UPDATE PAYROLL.

The PROJECT ASSOCIATE PAYROLL CONFIRMATION window opens:

• Click the blue EDIT link at the far right side of the window.

The PROJECT PAYROLL ALLOCATION PROCESS window opens:

Next to InStore (minutes), select the number of minutes from the dropdown:
  ○ Make sure that the correct amount of time is selected for EACH merchandiser assigned to the project
  ○ The TOTAL TIME must equal what was reported/submitted on the WorkOrder

• Click the SUBMIT UPDATE button.

The PROJECT ASSOCIATE PAYROLL CONFIRMATION window re-opens:
- Make sure the information is correct (click EDIT if you need to make changes)
- Make any relevant notes in the COMMENTS section
- At the bottom/center of the window, click the SUBMIT PROJECT PAYROLL CONFIRMATION button.

CLOSEOUT

You are returned to the PROJECT DETAIL INFORMATION (Work Order) window:

- Notice the screen now reads REVIEW PAYROLL in blue.
- Notice COMPLETE under the STATUS header.
- Close the WorkOrder window with the blue CLOSE WINDOW link at the top of the page.

COMPLETED TAB
The COMPLETED TAB shows the work that you have completed by week

COMPLETING A CERTIFICATION

Certifications can be required by Driveline, a Retailer, or a Manufacturer/Client in order to help you execute a program at a high level. Certifications typically explain/confirm the major aspects of a program, and consist of training materials and a test (which must be passed with a 100% score in order to become certified).

- Under the TRAINING link at the top of your Portal, select CERTIFICATIONS

- A list of available certifications will appear-

  - This list shows the Certification’s ID, Name, a brief description of the certification, the completion status, date completed, and links to the Training Materials and the Test.
  - It is very important to review ALL training materials BEFORE taking the certification test. **CLICK ON THE BLUE 'REVIEW LINK' to access the training materials**

- A list of available training materials will appear- these could be videos, MS Word documents, PDF documents, a link to a vendor managed site, etc.

  **CLICK ON THE BLUE 'REVIEW LINK'**
● Thoroughly review all training materials

● Once done, close the open windows and return to the main Certification screen

● CLICK ON THE BLUE ‘TEST’ LINK to take the Certification Test

● The FIELD ASSOCIATE CERTIFICATION TEST becomes available

○ Answer each question by clicking in the circle next to your selected answer
Once done, click the SUBMIT MY ANSWERS button at the bottom of the window.

- If you have any incorrect answers, you will see the screen below:

  ![Incorrect Answer Screen]

  - This screen will show you exactly which questions were answered incorrectly.
  - Re-review the training materials, and then click the CLICK HERE TO GO BACK AND SELECT THE CORRECT ANSWER button to change your answers.

- Once you have updated any incorrect answers, re-submit the test.

- When you have answered ALL questions correctly, you will see the window below:

  ![Correct Answer Screen]

  - Click the OK button to continue.

- When the screen below appears, click on the CLOSE WINDOW AND REFRESH MAIN SCREEN link at the top of the window.

- When you go back into the CERTIFICATIONS section, you will see 'Complete' next to the passed certification you just completed.

TROUBLESHOOTING SECTION

**Cannot Log In To Driveline System**

- Check that you have correctly typed (not copied and pasted) your user name (email address) and password. If still unable to log in, contact it@drivelineretail.com and your District Manager.
Forgot My Password

- On the Login Screen, click **LOST PASSWORD** and fill in your email address. Your password will be emailed to you. Check your spam/junk folder. The email may reside in your Spam or Junk Mail.

Cannot Print Work Orders or Documents…. **Rep cannot open plan documents in V3**

- Is Rep using Adobe Reader (or another type of supportive program) for PDF’s to open the document?
  - Link to download Adobe Reader is: [https://get.adobe.com/reader/](https://get.adobe.com/reader/)
- Ensure Rep is downloading the document before trying to open it.
- Ensure Rep's computer isn't opening PDF documents with the wrong program. Ensure they are opening with one of the above.