Merchandiser Training Manual

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</table>
Welcome to Driveline

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 RETAIL EXECUTION MANAGEMENT SYSTEM.
HOW TO ACCESS THE SMARTPROJECT RETAIL EXECUTION MANAGEMENT SYSTEM

To access the Driveline website, go to www.drivelineretail.com. We recommend bookmarking this web page on your computer for quicker access. The following window appears:

Hover over LOGIN, and select/click the Field Associate 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 'Login' button.
The **SMARTPROJECT RETAIL EXECUTION MANAGEMENT SYSTEM** Home window appears. We refer to this window as the Rep Portal Home Screen:

**PORTAL TABS & LINKS**

Directly below the **DRIVELINE** logo are drop-down tabs that link to other functions:

**USER PROFILE...USER SCHEDULE...TRAINING...UTILITIES...BULLETIN BOARD:**

**USER PROFILE**

<table>
<thead>
<tr>
<th>USER PROFILE</th>
<th>USER SCHEDULE</th>
<th>TRAINING</th>
<th>UTILITIES</th>
<th>BULLETIN BOARD</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
Hover over the **USER PROFILE** tab. Click the **MAINTAIN PROFILE** tab.

The **FIELD ASSOCIATE PROFILE MAINTENANCE** window opens. There are 4 major sections:

1) **ASSOCIATE SCHEDULING /RANKING INFORMATION**, completed by the District Manager.
2) **WORK REQUIREMENTS**, completed by the Merchandiser.

3) **TECHNOLOGY REQUIREMENTS**, completed by the Merchandiser.
4) **SCHEDULE AVAILABILITY**, 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, the Merchandiser must update the **SCHEDULE AVAILABILITY** section immediately and keep availability current at all times. Please keep your District Manager informed of any changes to your availability.

---

**USER SCHEDULE**

Hover over the **USER SCHEDULE** tab. Click the **REVIEW SCHEDULE** tab.

A summary-by-week of work assigned for the next 30 days opens:
Hover over the TRAINING tab.

The REVIEW TRAINING, DOWNLOAD TRAINING DOC and CERTIFICATIONS tabs open.

To view an eLearning course on Portal functions, Click REVIEW TRAINING.

1) Click the Computer/Reporting Related Training tab:

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2) Click **Rep Portal Training** tab.

3) Click the **Introduction to Merch/Rep Portal** tab, to launch the course.

DOWNLOAD TRAINING DOCUMENT
Click the **DOWNLOAD TRAINING DOCUMENT** tab, which accesses the **Merchandiser Training Manual**. This manual is a step-by-step guide to the **SMARTPROJECT RETAIL EXECUTION MANAGEMENT SYSTEM** (Rep Portal).

### CERTIFICATIONS

<table>
<thead>
<tr>
<th>TRAINING</th>
<th>UTILITIES</th>
<th>BULLETIN BOARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>REVIEW TRAINING</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DOWNLOAD TRAINING DOC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CERTIFICATIONS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click the **CERTIFICATIONS** tab, which accesses Retailer Certification information. 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.

### UTILITIES

<table>
<thead>
<tr>
<th>UTILITIES</th>
<th>BULLETIN BOARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORMS DEPOT</td>
<td></td>
</tr>
<tr>
<td>CONTACT MANAGER</td>
<td></td>
</tr>
<tr>
<td>PAYROLL DETAIL</td>
<td></td>
</tr>
<tr>
<td>EXTERNAL LINKS FOR REPS</td>
<td></td>
</tr>
</tbody>
</table>

Hover over the **UTILITIES** tab. The **FORMS DEPOT, CONTACT MANAGER, PAYROLL DETAIL** and **EXTERNAL LINK FOR REPS** tabs open.

### FORMS DEPOT

<table>
<thead>
<tr>
<th>UTILITIES</th>
<th>BULLETIN BOARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORMS DEPOT</td>
<td></td>
</tr>
</tbody>
</table>

Click the **FORMS DEPOT** tab to access a listing of company forms and policies. For example, you can access the *Dress Code Policy*, the *Direct Deposit Authorization form*, the *Terms of Work Acceptance* and the *Merchandiser Payroll Calendar*.

### CONTACT MANAGER

<table>
<thead>
<tr>
<th>UTILITIES</th>
<th>BULLETIN BOARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORMS DEPOT</td>
<td></td>
</tr>
<tr>
<td>CONTACT MANAGER</td>
<td></td>
</tr>
</tbody>
</table>

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Click the **CONTACT MANAGER** tab to access contact information for your District Manager and Regional Manager. Your District Manager is your first point of contact. If you have questions, issues or suggestions, contact your District Manager first. You may contact your Regional Manager, but our goal is to seek responses and resolutions from the District Manager level first, when possible.

**PAYROLL DETAIL**

Click the **PAYROLL DETAIL** tab to access details of your paychecks, for current and past pay periods.

**BULLETIN BOARD**

Click the **BULLETIN BOARD** tab to access Driveline's company Bulletin Board.

+++ 

**14 DAY WORK SCHEDULE SORTED BY PROJECT START DATE**

<table>
<thead>
<tr>
<th>SCHEDDATE</th>
<th>PROJECT</th>
<th>STORE</th>
<th>STORE</th>
<th>ADDRESS</th>
<th>CITY</th>
<th>STATE</th>
<th>MINUTES</th>
<th>LEAD NOTE</th>
<th>COMPONENT</th>
<th>CONFIRM</th>
<th>PRECALL</th>
<th>WORKORDER</th>
<th>PHO</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-Jan-2013</td>
<td>1009952</td>
<td>NEW</td>
<td>NEW</td>
<td>EDISON</td>
<td>NEW</td>
<td>NEW</td>
<td>NEW</td>
<td>EDISON</td>
<td>NEW</td>
<td>NEW</td>
<td>EDISON</td>
<td>NEW</td>
<td></td>
</tr>
<tr>
<td>15-Jan-2013</td>
<td>1009952</td>
<td>NEW</td>
<td>NEW</td>
<td>EDISON</td>
<td>NEW</td>
<td>NEW</td>
<td>NEW</td>
<td>EDISON</td>
<td>NEW</td>
<td>NEW</td>
<td>EDISON</td>
<td>NEW</td>
<td></td>
</tr>
<tr>
<td>15-Jan-2013</td>
<td>1009952</td>
<td>NEW</td>
<td>NEW</td>
<td>EDISON</td>
<td>NEW</td>
<td>NEW</td>
<td>NEW</td>
<td>EDISON</td>
<td>NEW</td>
<td>NEW</td>
<td>EDISON</td>
<td>NEW</td>
<td></td>
</tr>
</tbody>
</table>

**SCHEDDATE**

Under the **SCHEDDATE** column, projects are grouped by week and listed (by date). The **SCHEDDATE** column header functions as a link that sorts projects (by week):

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
If a Project **SCHEDULE DATE** is written in **blue font**, the Merchandiser may change the **SCHEDULE DATE**.

**SCHEDULE DATE**

17-Jun-2013

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

**SCHEDULE DATE**

12-Jun-2013

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.

**SCHEDULE DATE**

To change a **SCHEDULE DATE**, click the **blue-fonted** date. The **FIELD SCHEDULE MAINTENANCE UTILITY** window opens:

---

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The **FIELD SCHEDULE MAINTENANCE UTILITY** window provides project detail, plus your **FULL 30 DAY WORK ASSIGNED SCHEDULE**.

Click the drop-down arrow next to **NEWSCHEDULEDATE**. Select another date from the options provided.

When you change a date, you must select a reason for doing so. Click the drop-down arrow next to **RESCHEDULEREASON** to select an appropriate reason. Click **SUBMIT RESCHEDULE INFORMATION**:

**PROJECT ID/PROJECT**
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 RALEYS RUIZ FOODS FREEZER project.

The next few columns identify the Retailer’s Store number, Store Name, Address, City & State.
The linked STORENO column heading allows data in that column to be sorted numerically.
The linked CITY column heading allows data in that column to be sorted alphabetically.

MINUTES/LEAD
The **MINUTES** column displays the number of minutes allotted to perform the project. We conduct Time & Motion studies to determine the timings 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, a “**Y**” designation should be indicated. Contact your District Manager if an “**N**” appears.

**NOTE**

In the **NOTE** column, there are 2 notations that could appear: **COMPONENTS & CHECKIN REQD**.

**Components** are 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.

**Check-In Req'd** means (upon arrival at the store), you 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.

**COMPONENT**

The next column is **COMPONENT**. If **Components** were indicated in the previous **NOTE** column, the Merchandiser sees a **red RECEIVE** link in the **COMPONENT** column.

<table>
<thead>
<tr>
<th>NOTE</th>
<th>COMPONENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>/COMPONENT</td>
<td>RECEIVE</td>
</tr>
<tr>
<td>/COMPONENT</td>
<td>RECEIVE</td>
</tr>
</tbody>
</table>

Once **Components** are received or receipt is verified with store management, click the **red RECEIVE** link. The **FIELD FIXTURE RECEIPT TRACKING & CONFIRMATION UTILITY** window opens:

**FIELD FIXTURE RECEIPT TRACKING & CONFIRMATION UTILITY**

**CLOSE WINDOW**

THIS PROJECT REQUIRES COMPONENTS/FIXTURES FOR PROPER COMPLETION. REVIEW THE TRACKING INFORMATION PRESENTED BELOW AND CLICK TO INDICATE RECEIPT OF MATERIAL ONLY IF YOU HAVE RECEIVED ALL INDICATED REQUIRED SHIPMENTS.

<table>
<thead>
<tr>
<th>PROJECT</th>
<th>CARRIER</th>
<th>TRACKING</th>
<th>SHIPDATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>TRACKING INFORMATION UNAVAILABLE AT THIS TIME</strong></td>
<td></td>
</tr>
</tbody>
</table>

**CLICK HERE TO INDICATE RECEIPT OF PROJECT SHIPMENTS**

Click the **CLICK HERE TO INDICATE RECEIPT OF PROJECT SHIPMENTS** link.

**COMPONENT**

The **red RECEIVE** link then indicates **RECEIVED**, in black.

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The next column is CONFIRM. If a Project has not been confirmed, there will be a blinking red, UNCONFIRMED link under the CONFIRM column. Click the blinking red Unconfirmed link.

CONFIRM

The PROJECT ASSIGNMENT CONFIRMATION UTILITY window opens:

CONFIRM

Review the TERMS OF WORK ACCEPTANCE at the bottom of the screen.
Click the **CLICK HERE TO CONFIRM ACCEPTANCE** button:

![Project Assignment Confirmation Utility](image)

**Click Here to Confirm Acceptance**

**PROJECT ASSIGNMENT CONFIRMATION UTILITY**

<table>
<thead>
<tr>
<th>PROJECT</th>
<th>STORE</th>
<th>STORENAME</th>
<th>ADDRESS</th>
<th>ORDER</th>
<th>TEAM LEAD</th>
<th>ASSIGNED MINUTES</th>
<th>SCHEDULE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1009197 PHONE</td>
<td>54 - TRAINING 1</td>
<td>VELINE (136000)</td>
<td>1810 SANDHILLS</td>
<td>18768392</td>
<td>Y</td>
<td>60.00</td>
<td>11:30AM-13</td>
</tr>
</tbody>
</table>

**SAME STORE CURRENT WEEK PROJECTS TO CONSOLIDATE**

<table>
<thead>
<tr>
<th>PROJECT</th>
<th>DESCRIPTION</th>
<th>SCHEDULE</th>
<th>HARDDATE</th>
<th>MINUTES</th>
</tr>
</thead>
</table>

*These projects (if not hard dated and project parameters allow) will be confirmed along with selected project with assignment to same date as reflected above. This consolidation is done to increase efficiency of both project confirmations and project instore activity.*

**TERMS OF WORK ACCEPTANCE**

1. I understand and agree that each of the requirements, terms and conditions set forth in the "confirmation and acceptance of terms and conditions" (the "terms and conditions") are essential terms for the work and conditions for payment in connection with the work.

2. I agree to complete the work on or by the schedule date, as specified above, for completion of the work ("schedule date").

3. I agree to complete the work within the time allowed for the work, as specified above. I understand and agree that the time allowed for the work will include administrative time (e.g., preparation for routes, completion of work orders, submission of digital photographs, etc.) as well as store time ("instore time"). I further understand and agree that if additional time is needed to complete the work, such additional time must be pre-approved by my driveline manager in writing.

Another ‘Confirm’ window may open. Click **Resend**...or **Refresh**...or **Retry**...or **Reload**:

![Confirm Window](image)

To display this page, Firefox must send information that will repeat any action (such as a search or order confirmation) that was performed earlier.

We are returned to the Portal Home screen.

Under the **CONFIRM** column, a **CONFIRMED** message appears:

<table>
<thead>
<tr>
<th>COMPONENT</th>
<th>CONFIRM</th>
<th>PRECALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>....</td>
<td>CONFIRMED</td>
<td>....</td>
</tr>
</tbody>
</table>

Complete this confirmation process for each project you are accepting under the **SCHEDDATE** column.

Projects can be loaded into the system daily. Check your portal page daily to confirm recently-added projects.

Once a project is complete, you must log into the portal and report your project as ‘complete’ on the same day as the store visit.

If there is a project on your schedule you cannot accept, contact your District Manager immediately so s/he can reassign that project.

**PRECALL**
If you are required to make a PRECALL to the store prior to your visit, a blue ENTER link appears in the PRECALL column:

**PRECALL**

**ENTER**

Click the ENTER link.

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

<table>
<thead>
<tr>
<th>PROJECT PRECALL MANAGEMENT ADD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CLOSE WINDOW</strong></td>
</tr>
<tr>
<td>1099004 DG - PET FOOD RESET WAVE 1 (DECEMBER)</td>
</tr>
<tr>
<td>STORE: 12345</td>
</tr>
<tr>
<td>LOCATION: 12000 YOSEITE BLVD · WATERFORD · CA</td>
</tr>
<tr>
<td>PHONE: 2094424116</td>
</tr>
<tr>
<td><strong>PRECALL DETAIL ENTRY</strong></td>
</tr>
<tr>
<td>Contact Name:</td>
</tr>
<tr>
<td>Contact Position:</td>
</tr>
<tr>
<td>Comments:</td>
</tr>
</tbody>
</table>

After completing the PRECALL with Store personnel, complete the PROJECT PRECALL MANAGEMENT ADD window.

In the **Contact Name** field, enter the name of the Store personnel with whom you spoke.

In the **Contact Position** field, click the drop-down arrow and select the position of the person with whom you spoke.

Enter any applicable comments in the **Comments** section.

After completing the PROJECT PRECALL MANAGEMENT ADD window, click the **SUBMIT** button at the bottom of the window.

**WORK ORDER**
The next column is the WORK ORDER column. The Work Order is one of the most important documents with which you will work. It contains or links to all pertinent information needed for a Project. Note: The Work Order is only available after a project has been CONFIRMED. To view project documentation prior to confirmation, click the blue DOCS link, under the DOCS column at the far right of the portal home screen:

To access the Work Order, click the blue ENTER link under the WORK ORDER column:

The PROJECT DETAIL INFORMATION window opens.
This window is referred to as the Work Order:

**PROJECT DETAIL INFORMATION (Work Order)**

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Some projects require additional forms be completed (i.e., *Inventory, Out-of-Stock, Returns & Order* forms). These form print automatically with the Work Order. 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:
1. PROJECT ID
2. STORE ADDRESS & TELEPHONE NUMBER
3. STORE ID
4. ORDER ID
5. PROJECT DESCRIPTION
6. SCHEDULE DATE
7. TOTAL TIME
8. PROJECT TRAINING MATERIAL
9. Link to Project Planogram

The **PROJECT DETAIL INFORMATION (Work Order)** also links to Planogram specific materials, such as schematics, instructions, etc.

Click the blue link under the **PLANO** column to access project Planogram materials:

The **Work Order** also includes the **PROJECT TRAINING MATERIAL** section, from where you link to Training material needed for the project. Each document will be listed by name:

To the right of each document name is **MUST PRINT** or **MUST REVIEW**.

To the right of **MUST PRINT / MUST REVIEW**, click the **REVIEW** link to access/print applicable Training material.

**REPORTING A PROJECT**
After completing a project, log onto the SMARTPROJECT RETAIL EXECUTION MANAGEMENT SYSTEM (Rep Portal) to ‘report’ your project as complete on the same day as the store visit.

On the Portal Home Screen, click the ENTER link under the WORKORDER column:

The PROJECT DETAIL INFORMATION (Work Order) window opens:

Under the PROJECT PLAN-O-GRAM SUMMARY section, click the UPDATE link under STATUS:

PROJECT PLAN INFORMATION (Work Order)

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After clicking the **UPDATE** link:

The **PROJECT PLAN INFORMATION** window opens.
This window is also referred to as the **Work Order**, when ‘reporting’ the project:

Each **PROJECT PLAN INFORMATION** (Work Order) 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 **PROJECT PLAN INFORMATION** (Work Order).
If additional forms are required, the form(s) printed with the **Work Order**.
Enter **Inventory, Out Of Stocks, Orders, Return** counts via the **red links** at the top left of the **PROJECT PLAN INFORMATION** (Work Order).
Additional forms (i.e., **Inventory, Out of Stock, Orders, Returns**) require completion & submission before the **Work Order** can be submitted (unless otherwise noted).
If data entry errors occur, contact your District Manager to have the **Work Order** reset.

Click **SUBMIT WORKORDER**.

**PROJECT PLAN INFORMATION** (Work Order)
After clicking **SUBMIT WORKORDER**:

The **WORK ORDER SUBMISSION CONFIRMATION** window opens with a confirmation number:

![WORK ORDER SUBMISSION CONFIRMATION]

Write this confirmation number on the **PROJECT PLAN INFORMATION** (Work Order).

Retain **Work Orders** 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):

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>ITEM</th>
<th>MODEL</th>
<th>DESCRIPTION</th>
<th>PACK</th>
<th>CUSTITEM</th>
<th>QUANTITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURAFILTER AIR FILTERS</td>
<td>1113426</td>
<td>0</td>
<td>10X20X1 MERV 8</td>
<td>1</td>
<td>110200107</td>
<td>0 +</td>
</tr>
<tr>
<td>PURAFILTER AIR FILTERS</td>
<td>1113429</td>
<td>0</td>
<td>12X12X1 MERV 8</td>
<td>1</td>
<td>112120107</td>
<td>0 +</td>
</tr>
<tr>
<td>PURAFILTER AIR FILTERS</td>
<td>1113431</td>
<td>0</td>
<td>12X20X1 MERV 8</td>
<td>1</td>
<td>112200107</td>
<td>0 +</td>
</tr>
</tbody>
</table>

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

**TYPES OF FORMS**

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
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:

<table>
<thead>
<tr>
<th>TYPES OF FORMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7</td>
</tr>
</tbody>
</table>
**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:

![Available Plan-O-Gram Items](image)

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:

![Available Plan-O-Gram Product/Inventory Returns](image)

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

  ![Submit Returns](image)

**TYPES OF FORMS**

Driveline Merchandising Training Manual Gold Master _8.11.14_ v1.7
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

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
The **PHOTO UPLOAD** link appears on the **PROJECT DETAIL INFORMATION** (Work Order) window, after completion and submission of the **PROJECT PLAN INFORMATION** (Work Order). 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. You must be able to accurately match each photo with each project:

![Print Work Order - Close Window](image)

![PROJECT DETAIL INFORMATION](image)

![PROJECT PLAN-O-GRAM SUMMARY](image)

![PROJECT DIGITAL IMAGE SELECTION UTILITY](image)

Click **PHOTO UPLOAD**.

The **SMARTPROJECT DIGITAL IMAGE MANAGEMENT** window opens:
Our system requires photo-uploading software on your computer. Upon your first PHOTO UPLOAD attempt, you may be prompted to ‘download’, ‘run’, or ‘install’ photo-uploading software.

Follow the prompts to download/install the software. Once installed, you are able to select photos from source folders and files listed on the left-hand side of the screen:

1. Click on a folder/file where photos are stored. Photos populate to the right
2. Click on a photo(s)...the photo(s) will highlight
3. Click inside the square at the top, left of the photo(s). A checkmark (v) appears:
4. Click the SEND button:

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
After clicking the **SEND** button, 2 small windows appear:

5. Click **OK** on **Upload Complete** window.

6. The **SMARTPROJECT DIGITAL IMAGE PLANOGRAM ASSIGNMENT MANAGEMENT** window opens:

<table>
<thead>
<tr>
<th>SMARTPROJECT® DIGITAL IMAGE PLANOGRAM ASSIGNMENT MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>UPLOAD FILE COUNT: 1</td>
</tr>
<tr>
<td>BAYASSIGN</td>
</tr>
<tr>
<td>1001906 NEW HIRE TRAINING CALL</td>
</tr>
<tr>
<td>Rep CU conducting</td>
</tr>
<tr>
<td>inventory.jpg_Thumbnail1.jpg</td>
</tr>
</tbody>
</table>

7. Click **SUBMIT IMAGE PLANOGRAM CONFIRMATION** button.
8. After clicking the **SUBMIT IMAGE PLANOGRAM CONFIRMATION** button:

<table>
<thead>
<tr>
<th>BAYASSIGN</th>
<th>PHOTO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1001906 NEW HIRE TRAINING CALL</td>
<td><img src="inventory.jpg_Thumbnail1.jpg" alt="Rep CU conducting" /></td>
</tr>
</tbody>
</table>

**SUBMIT IMAGE PLANOGRAM CONFIRMATION**

9. The **SMARTPROJECT DIGITAL IMAGE UPLOAD CONFIRMATION** window opens:

**SMARTPROJECT© DIGITAL IMAGE UPLOAD CONFIRMATION**

<table>
<thead>
<tr>
<th>PROJECT:</th>
<th>ORDERID:</th>
<th>PHOTOQTY:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1009091 NEW HIRE TRAINING CALL (DECEMBER)</td>
<td>18292809</td>
<td>1</td>
</tr>
</tbody>
</table>

**CONFIRMATION ID NUMBER**

80847382

**THANK YOU FOR YOUR SUBMISSION. PLEASE BE SURE TO COMPLETE PAYROLL CONFIRMATION PROCESS (IF REQUIRED) UTILIZING UPDATE LINK ON YOUR HOMEPAGE.**

10. Write the **red Confirmation ID Number** on the **Work Order**.
    Retain **Work Orders** for at least 90 days.

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

**PHOTO UPLOAD**

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
12. You are returned to the **PROJECT DETAIL INFORMATION (Work Order)** window:

![Project Detail Information](image)

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

**UPDATE PAYROLL**

Click the **UPDATE PAYROLL** link:

Driveline Merchandising Training Manual Gold Master _8.11.14_v1.7
The **PROJECT ASSOCIATE PAYROLL CONFIRMATION** window opens:

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

**UPDATE PAYROLL**

After clicking the **blue EDIT** link:

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
The **PROJECT PAYROLL ALLOCATION PROCESS** window opens:

Next to **InStore (minutes)**, enter the number of minutes taken to complete the project.

Click **SUBMIT UPDATE**.

**UPDATE PAYROLL**

After clicking **SUBMIT UPDATE**: 

Driveline Merchandising Training Manual Gold Master _8.11.14_v1.7
**PROJECT PAYROLL ALLOCATION PROCESS**

<table>
<thead>
<tr>
<th>Associate:</th>
<th>1099717 AETEST AETEST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instore(minutes):</td>
<td>60.00</td>
</tr>
</tbody>
</table>

**SUBMIT UPDATE**

The **PROJECT ASSOCIATE PAYROLL CONFIRMATION** window re-opens:

<table>
<thead>
<tr>
<th>PROJECTID</th>
<th>PROJECTNAME</th>
<th>PLANTDESC</th>
<th>QTY</th>
<th>ESTMINUTES</th>
<th>ACTMINUTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1099197</td>
<td>PHONE TEST 1-Audit</td>
<td>TEST 1</td>
<td>1</td>
<td>60.00</td>
<td>60.00</td>
</tr>
</tbody>
</table>

**CLOSE OUT**

At the bottom/center of the window, click the **SUBMIT PROJECT PAYROLL CONFIRMATION** button.

---

**CLOSEOUT**

After clicking the **SUBMIT PROJECT PAYROLL CONFIRMATION** button:

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
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** column.

Close the **PROJECT DETAIL INFORMATION** (Work Order) window with the **blue CLOSE WINDOW** link.

**CLOSEOUT**
You are now returned to the SMARTPROJECT RETAIL EXECUTION MANAGEMENT SYSTEM (Rep Portal Home Screen).

It will be necessary to ‘Refresh’ this screen. After ‘refreshing’, the project listing should move to the bottom of the screen under the column heading: **COMPLETED WORK**:

<table>
<thead>
<tr>
<th>WORKORDER</th>
<th>PHOTOS</th>
<th>PAYROLL</th>
<th>COMPLETED WORK</th>
</tr>
</thead>
<tbody>
<tr>
<td>REVIEW</td>
<td>REVIEW</td>
<td>REVIEW</td>
<td></td>
</tr>
</tbody>
</table>

All 3 sections have been successfully processed:

**DOCS**

The **WORKORDER** and **PHOTOS** columns will initially indicate **REVIEW**.

**DOCS**

However, accessing project Documentation should be one of the first tasks a Merchandiser performs when assigned to a project.

The **WORK ORDER** and the **DOCS** column are the two locations to source project Documentation. However, the **Work Order** is not accessible until a project has been confirmed.

The blue **DOCS** link, under the **DOCS** column, is available when a project is assigned:

Click the blue **DOCS** link.
After clicking the **blue DOCS** link:

![DOCS](image)

The **RETAIL TRAINING MANAGEMENT** window opens:

![Retail Training Management](image)

Click the **blue REVIEW** link next to each entry to access project Documentation.

**CERTIFICATION PROCESS**

Driveline Merchandising Training Manual Gold Master _8.11.14_v1.7
From your Portal Home Screen, click the **CERTIFICATIONS** link under the **TRAINING** tab:

![Training Menu]

The **REP CERTIFICATION MANAGEMENT** window opens:

![CERTIFICATION MANAGEMENT Window]

Locate the Certification of your choice using the **CERTID** or **NAME** columns. For example, **1000026/PS GREETING PROGRAM IN FAMILY DOLLAR**. Click the **REVIEW** link, next to the Certification you want to review.

The **FIELD ASSOCIATE CERTIFICATION TRAINING MATERIAL** window opens:

![FIELD ASSOCIATE CERTIFICATION TRAINING MATERIAL]

Click the **REVIEW** link next to each entry and study the Certification material.

In this example, the Merchandiser would review 10 videos and a **MSWORD** document.

**CERTIFICATION PROCESS**

Driveline Merchandising Training Manual Gold Master _8.11.14_ v1.7
Here is a sample cover page of the downloaded MSWORD Certification Training Manual for the PS GREETINGS PROGRAM in Family Dollar:

Training Session – PS Greetings Continuity Program in Family Dollar

ABOUT THE PROGRAM:
PS Greetings supplies the greeting cards, invitations, gift bags (located on power wings) and balloons (in selected stores) to all Family Dollar stores. All items are delivered to Family Dollar on a direct to store delivery (DSD) basis.

After reviewing the MSWORD document and the 10 videos, you may now take the Certification test:

<table>
<thead>
<tr>
<th>CERTID</th>
<th>NAME</th>
<th>DESCRIPTION</th>
<th>COMPLETE</th>
<th>DATE</th>
<th>REVIEW</th>
<th>TEST</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000026</td>
<td>PS GREETINGS PROGRAM IN FAMILY DOLLAR</td>
<td>CERTIFICATION TO CONFIRM KNOWLEDGE AND UNDERSTANDING OF PROCESSES SURROUNDING THE PS GREETINGS PROGRAM IN FAMILY DOLLAR</td>
<td>N</td>
<td>-----</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click the blue TEST link under the TEST column.

CERTIFICATION PROCESS
Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
The **FIELD ASSOCIATE CERTIFICATION TEST** window opens. Enter your responses for each question:

![Field Associate Certification Test](image)

Click **SUBMIT MY ANSWERS** at the bottom of the window:

![Submit Answers](image)

If you were not successful in passing the Certification, the questions you missed will appear:

![Questions Missed](image)

Click the link at the bottom to be re-directed to the questions again.

**CERTIFICATION PROCESS**

Driveline Merchandising Training Manual Gold Master _8.11.14_v1.7
Once you have successfully completed the Certification test, the screen informs you of your Certification status and directs you to the Portal Home Screen:

![Certification Information Window](image)

From the SMART PROJECT RETAIL EXECUTION MANAGEMENT SYSTEM Home screen, click the MAINTAIN PROFILE link under the USER PROFILE tab, on the Portal Home Screen:

![Portal Home Screen](image)

Scroll down to the bottom of the window.

Your Certification(s) are listed under WORK CERTIFICATIONS COMPLETED section:

<table>
<thead>
<tr>
<th>WORK CERTIFICATIONS COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURAFILTER ECERTIFICATION</td>
</tr>
<tr>
<td>STOREBOARD MEDIA SERVICE</td>
</tr>
</tbody>
</table>

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
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@dreivelineRetail.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 Microsoft Word or Microsoft Word View to open the document. link to download word viewer is: http://support.microsoft.com/kb/891090
• Ensure rep is downloading the document before trying to open it.
• Ensure Rep’s computer isn’t opening Word documents with the wrong program. Ensure they are opening with one of the above.
• NOTE: These documents can also be opened using openOffice (Which is free and can be downloaded at www.openoffice.org)

Download Photo-Uploading Software

The Aurigma Active Controller (software to assist in photo uploading) needs to be installed only once. This “plugin,” for various web browsers, allows you to individually select photos to upload. The photos can be rotated to achieve the required orientation. Image quality is also optimized. When you click the PHOTO UPLOAD link, the first time you use the system, you will be prompted to install the Aurigma Photo Uploader:
**TROUBLESHOOTING SECTION**

**Windows XP Internet Explorer 8**
At the top of the photo upload page you will see a yellow bar
- Click the yellow bar at the top
- Click Install **This Add-on for All Users on This Computer**

![Image of Internet Explorer security warning]

- Click **Install**:

  ![Image of Java download prompt]

**Windows XP Firefox and Chrome**
Go to [www.java.com](http://www.java.com)
- Click the **Free Java Download** button
- Click the **Agree and Start Free Download** button
- If you get this message click **Save File**

Driveline Merchandising Training Manual Gold Master_8.11.14_v1.7
TROUBLESHOOTING SECTION

Windows XP Firefox and Chrome
If you are using Chrome skip this step

• Double click jxpinstall.exe

If you are using Firefox skip this step
• Click the little arrow to the right
• Then click Open

If you are using Google Chrome skip this step
• Click OK
• Click Run
• Click Install
TROUBLESHOOTING SECTION

• Uncheck **Install the Ask Toolbar**
  Note: This checkbox can contain different text.
• Click **Next >**
TROUBLESHOOTING SECTION

• Close all your browser windows.
• Log back into V3 and go to the image upload page

For Chrome skip this step
• When this warning comes up check
  
  **Always trust content from this publisher.**

• Click **Run**

For Firefox skip this step
• Click **Always run this site**
TROUBLESHOOTING SECTION

Windows 7 Internet Explorer 9

At the bottom of the photo upload page you will see a yellow bar
• Click Install

Windows 7 Firefox and Chrome

• Go to www.java.com
• Click the Free Java Download button
• Click the Agree and Start Free Download button
• If you get this message click Save File
TROUBLESHOOTING SECTION

If you are using Chrome skip this step
• Double click jxpinstall.exe

If you are using Firefox skip this step
• Click the little arrow to the right
• Then click Open

• Click Yes
• Click Install
• Uncheck Include FREE McAfee Security
  Note: This checkbox can contain different text.
• Click Next
TROUBLESHOOTING SECTION

• Click **Close**
• Close all your browser windows.
• Log back into V3 and go to the image upload page
For Chrome skip this step
• When this warning comes up check **Always trust content from this publisher.**
• Click **Run**

![Image of warning message]

For Firefox skip this step
• Click **Always run this site**

![Image of Java permission message]

Once the “plugin” is installed you will be able to browse your computer and select specific pictures to upload.

This is a screenshot showing a folder on a computer where you may find photos to upload:
TROUBLESHOOTING SECTION

Only use the PHOTO NO UPLOAD EXPLAIN UNABLE TO UPLOAD PHOTOS link for legitimate reasons. Email notification is sent to the Merchandiser's District Manager whenever this link is used.