SMP Web Administration Utility User Manual

Updated February, 2021

SMP Administration web site— https://mysmp.salesmanagementplus.com/SMPAdmin
Product Information— http://www.gosmp.com/
Customer Support—949-258-0410 or support@gosmp.com

Table of Contents

***NOTE: Each Section heading below is hyperlinked to the stated page
Ctrl + Mouse Click will direct you to the desired section

Overview

The SMP Web Administration Tool is a web page which allows users with the appropriate permissions to perform a number of the configuration activities needed to actively maintain and update their Sales Management Plus database. This SMP Admin Tool gives users more control over and ownership of the SMP application.

The Sales Management Plus Web Administrative Tool was designed for use with Internet Explorer 6 or higher web browsers. The site may not function correctly if used in an alternative browser (Google Chrome, Firefox).

To access the Sales Management Plus Web Administrative Tool, please visit our web site www.GoSMP.com; select Support and then SMP Administration. We suggest users also bookmark this page and/or add it to their web browser favorites. Users will enter their standard Sales Management Plus Domain, Login Name and Password to access this secure site.

*****Please note: The SMP Team is currently working to shift functionality away from a web-based management portal, and into the SMP Desktop Client interface. This transition will take place over time. The first chapter in this documentation will be dedicated to functionality currently available in the SMP Administration area in SMP Desktop until all functionality is migrated.***

Users are restricted to what they can do in the SMP Admin tool, which is based on their login permissions.

- All SMP users have access but only certain administrators have the rights to use the tool
- With the exception of User/Employee Maintenance, users have full access to an area if they have the role that corresponds to that area
- All employees that are *Active* in the SMP Admin tool are employees that exist in your SMP application
- All employees that are *Users* do in fact use the SMP application and have existing permissions with login names and passwords
- If an employee is a User of SMP, then he/she is also an Active employee in the application

Two of the functional areas are security related:

1. *Territory/Branch* management, which allows the user to create territories that define security boundaries
2. *Employee/User* management is used to grant permissions to users (includes user permissions for Advanced Reporting)

***NOTE: There is a timeout value in the SMP Admin Tool, so save changes often when working. Also, there are "Red" alerts that the SMP Admin tool will provide to the user if something is done wrong or is not completed. The user cannot save the changes until those issues are resolved.**

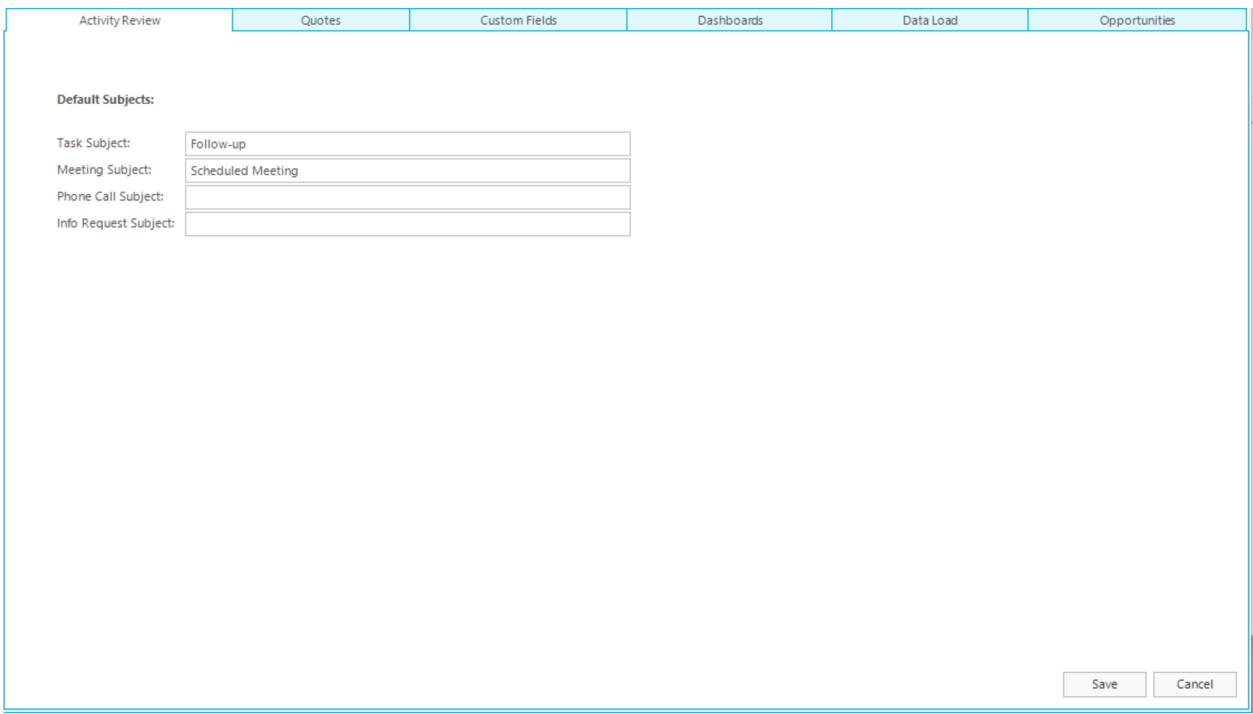
SMP Administration – Inside SMP Desktop Client

The Sales Management Plus Desktop Client features a subject area labeled as **Global Settings** where admin users can manage select functionality for the Sales Management Plus environment. This section details what can be managed, via tabs, inside the subject area. Where necessary, links to other areas of the documentation have been added, so admins can access further information on managing functionality related to these areas via the *Web-Based Administration page.*

NOTE: Once changes have been made via the Administration page inside the SMP Desktop Client, users will need to log out and back in to see changes take effect.

Activity Review Tab

Within the Activities tab, Admins can designate default subjects for each of the four SMP Activity types – Tasks, Phone Calls, Customer Meetings and Info Requests.



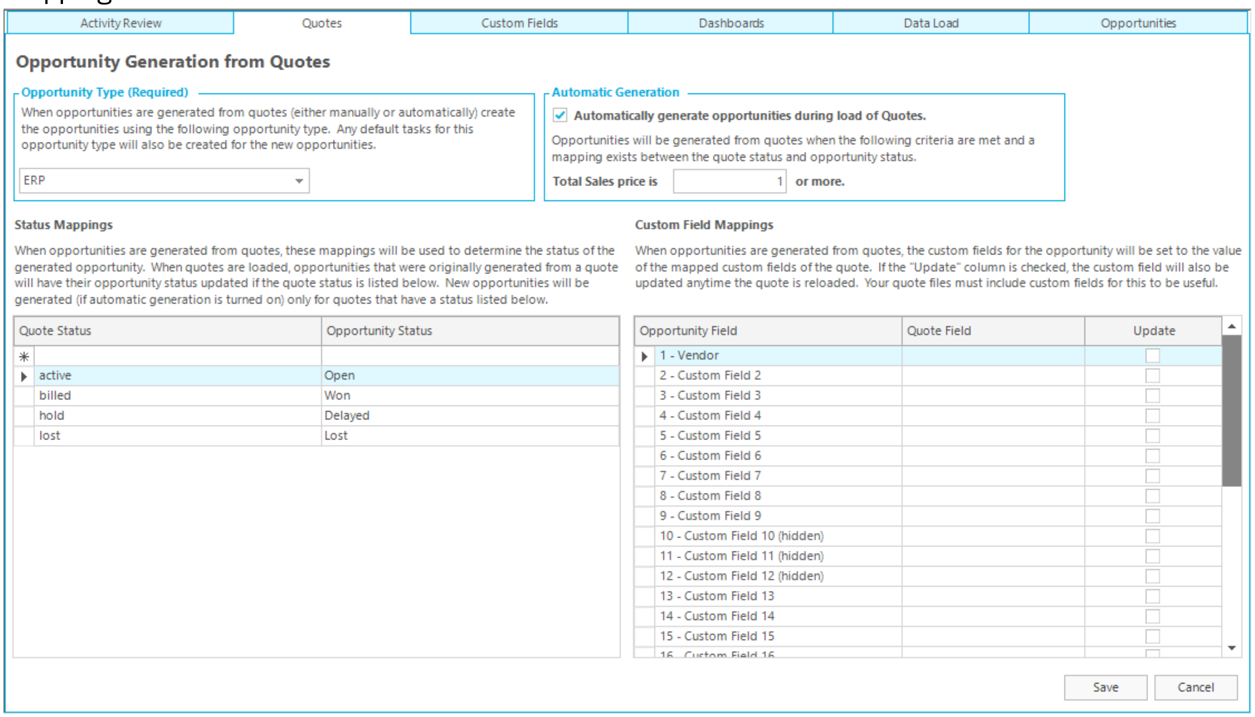
To add defaults, click in the text area for the designated Activity, and enter the desired value.

NOTE: this does not add the value to the dropdown list for Activity subjects. This must still be managed inside the website for SMP Administration. Please see the section on Selection Lists for more information.

Once the values are associated (or edited), click "Save" at the bottom left.

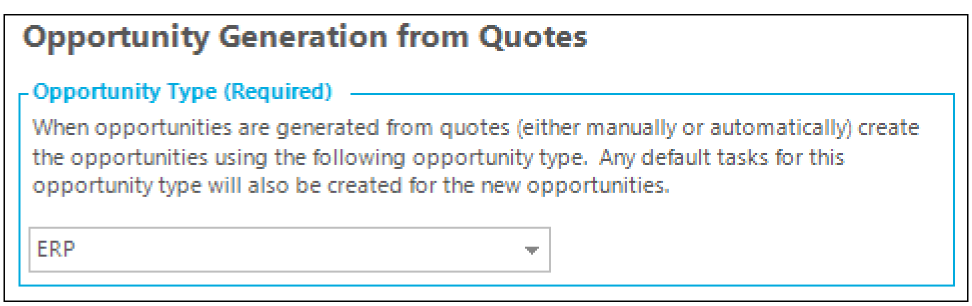
Quotes Tab

Bids & Quotes tab within SMP Admin allows admin users to configure the import of Quote data to automatically trigger the generation of new Opportunitys within SMP. Sales dollar thresholds (e.g.: any Quote over $X dollars gets created as a Opportunity), and allows for the mapping of the Quote status from the ERP to be mapped to a relevant SMP-centric Opportunity Status. Additionally, users can configure custom fields from the ERP Quotes to map into SMP Opportunitys via Custom Field Mapping.



Using Opportunity Generation from Quotes

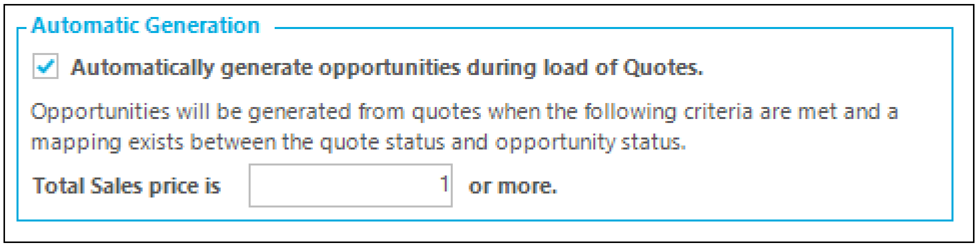
When SMP Opportunities are to be generated from quotes, admin users must first designate the Opportunity TYPE to be automatically populated – this is required to use Opportunity Generation. Using the dropdown list at the upper left of the form, Admins can designate the Type to be used. The dropdown list provided pulls Opportunity Types from the Admin "Opportunitys" tab. (NOTE: if Admins wish to create a new Opportunity Type, it can be created in the Opportunities tab first, then selected from the dropdown. See information on Opportunitys tab later in the documentation.



Once the Opportunity Type is associated (or edited), click “Save” at the bottom left.

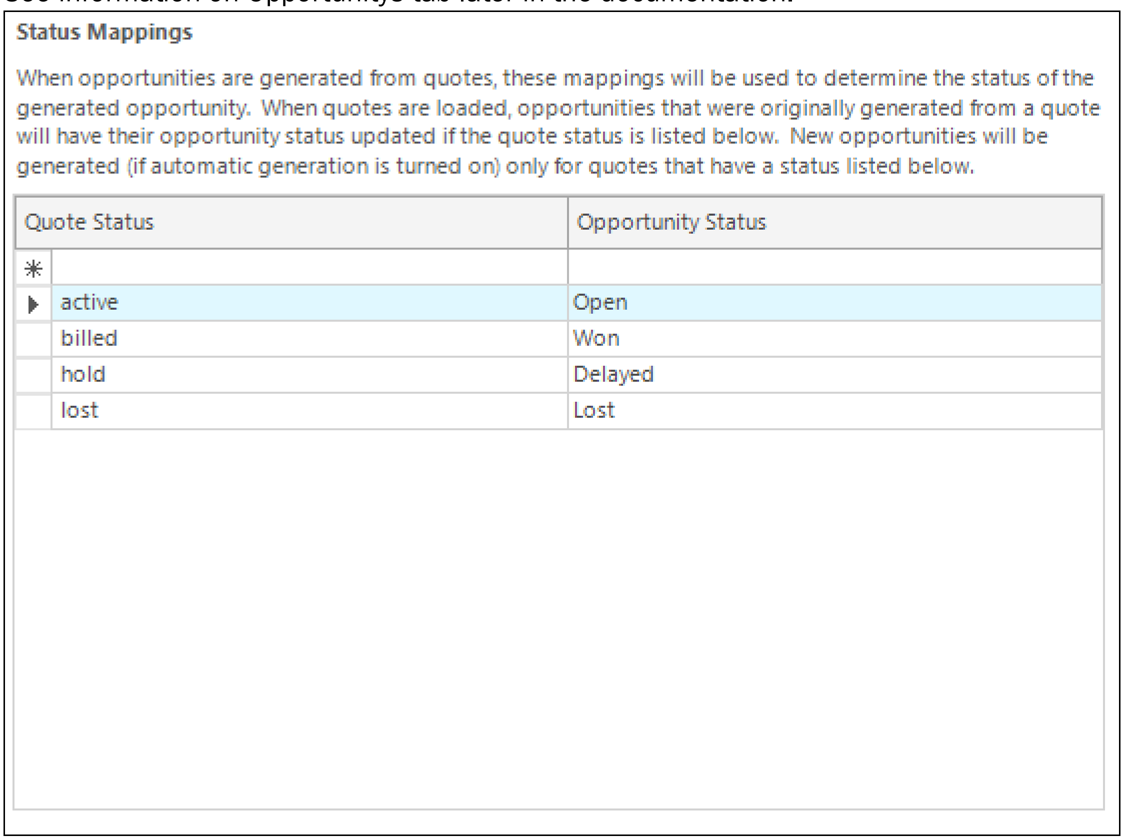
The Admin must also designate the value of quotes to be brought in as SMP Opportunities.

1. To designate that SMP Opportunities should be created from imported quotes, first check off the “Automatically generate opportunities” box.
2. Next, enter the minimum quote value for which the company wants Opportunities created (e.g.: any quote equal or greater than $X will trigger a Opportunity).



Once the designations are added (or edited), click “Save” at the bottom left.

Finally, the admin may choose map the Quote status to an existing SMP Status; this is not required, but if the client’s ERP supports Quote Statuses, this is how they can be mapped to match SMP Opportunity Statuses, when the Quote is linked to a Opportunity. The dropdown list provided pulls Opportunity Status from the Admin “Opportunitys” tab. (NOTE: if Admins wish to create a new Opportunity Status, it can be created in the Opportunitys tab first, then selected from the dropdown. See information on Opportunitys tab later in the documentation.

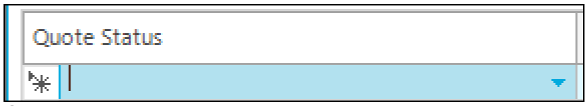


Status Mappings

When opportunities are generated from quotes, these mappings will be used to determine the status of the generated opportunity. When quotes are loaded, opportunities that were originally generated from a quote will have their opportunity status updated if the quote status is listed below. New opportunities will be generated (if automatic generation is turned on) only for quotes that have a status listed below.

Quote Status	Opportunity Status
active	Open
billed	Won
hold	Delayed
lost	Lost

1. To add a new line to the “Quote Status” table, click the star icon on the left of the text field.



2. Next, type the value, exactly as it will appear from the imported data and hit enter. The cursor will then default to the Opportunity Status field; using the dropdown, select the congruent value for the SMP Status of the Opportunity.
    a. To delete a row created in error, click the row indicator and then click delete; click Yes to confirm the delete in the popup window to proceed, or No to exit out of the delete function.
3. To edit an existing value, click the row selector to the left of the value you wish to edit – the row (Quote Status value and SMP Status) will become edit-able.

Once the mappings are added (or edited), click “Save” at the bottom left.

Using Custom Field Mappings
Admins can designate additional custom field from the ERP Quotes to be added to SMP, as necessary. There are a maximum of 25 additional fields which can be added to Opportunitys. Please see the section on Custom Fields later in documentation for more information on customization of field names, etc.

To add Custom Fields, begin by configuring the mapping table.
1. In the Opportunity Field, designate the name to be displayed inside SMP for the field (similar to what would be done for Customer or Contact Profile Fields).
2. In the Quote Field, designate the custom field position the value should be read from by using the dropdown list to select a field 1-25.
3. Check the “update” box if the Opportunity is to be regularly updated with the custom data
    a. If the box is checked, SMP Opportunity will be updated to reflect the new value the next time Quotes are imported again.
    b. If it is un-checked, the value will be added to the Opportunity on creation only, and will not be updated if the Quotes are uploaded again.

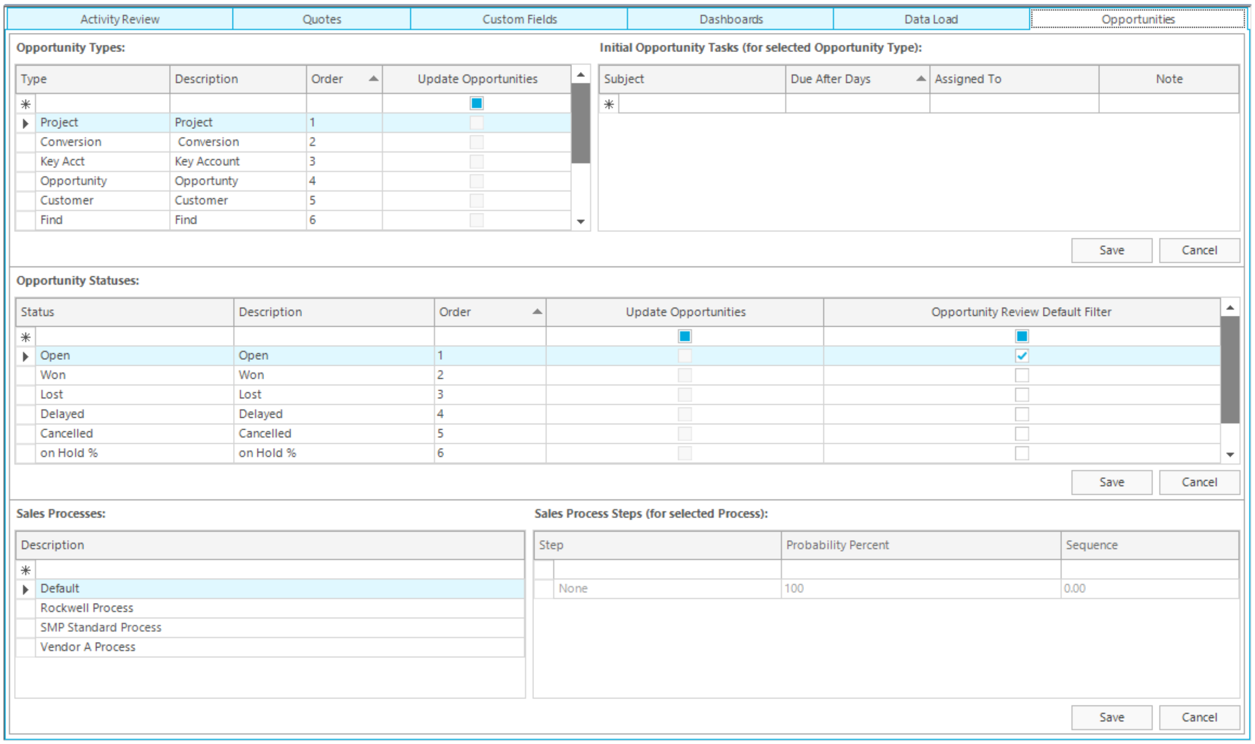
Once the mappings are added (or edited), click “Save” at the bottom left.

NOTE: to manage field names, descriptions, dropdown options, etc. please see the section on Custom Fields later in this chapter.

Opportunitys Tab

The Opportunitys tab allows the Admin to control Opportunity Type and Status dropdowns, Opportunity Processes and Sales Stages, as can be done today in the website version of SMP Administration.

Admins can also designate initial Opportunity Tasks to be added to an SMP Opportunity upon creation – either through Quote import, Opportunity Import or manual Opportunity creation (Opportunity Add/Edit).

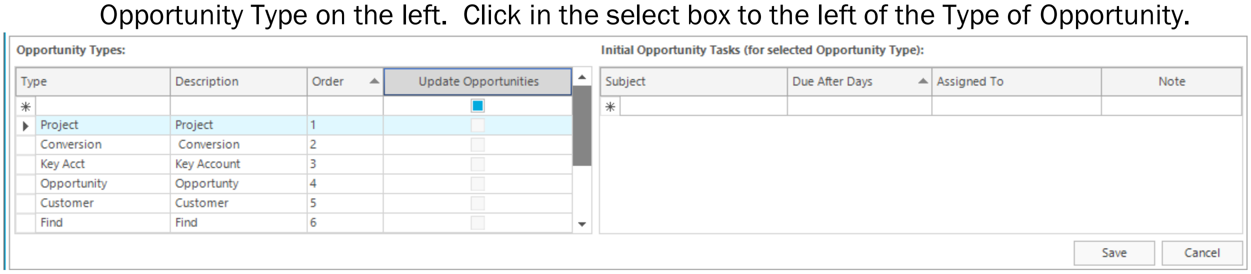


NOTE: Management of Opportunity Type, Priority and Status dropdowns can be managed (add, edit, delete) via the SMP Web Administration Page. Please see the section on Selection Lists for more information.

Adding SMP Tasks Automatically to Opportunitys

Any number of tasks can be added initially to a given Opportunity Type, and users can set up each Opportunity Type with its own set of Tasks.

1. To designate SMP Tasks to be automatically added to a Opportunity, begin by selecting a Opportunity Type on the left. Click in the select box to the left of the Type of Opportunity.



2. Under “Initial Opportunity Tasks” start by adding the initial SMP Task to be added
    a. Select the Subject – using the dropdown list, Admins can select from the existing pre-loaded SMP Task subject, or the Admins can type in a new value for the Task subject
    b. Set the due date – this will be a calculated date based on the import date of the Opportunity; e.g.: to make the task due 5 days after it is imported, enter the number 5 in the “due after days” field
    c. Select the individual responsible for completing the task using the Assigned To dropdown – choose “[Account Manager]” to designate the customer’s assigned outside sales rep, or choose another individual from the list

   i. **NOTE:** ALL Tasks for ALL Opportunitys of this type will be assigned to the individual designated – in most cases the Account Manager is likely the most viable choice, as he/she is interacting with the customer on a regular basis.

d. Add notes. Clicking on the notes field will bring up a text box where general notes can be entered.
   i. **NOTE:** ALL Tasks for ALL Opportunitys of this type will have the same initial set of notes loaded.

e. Now, add additional Tasks as necessary by repeating steps A-D above, until all necessary tasks are added.

Once the mappings are added (or edited), click "Save" at the bottom left of the section (immediately below the Task section)

Custom Fields Tab

Administrators can customize a number of additional custom fields here. Note that the management of these custom fields IS NOT RELATED to management of Profile Fields specific to Companies and Contacts, as outlined later in the documentation.

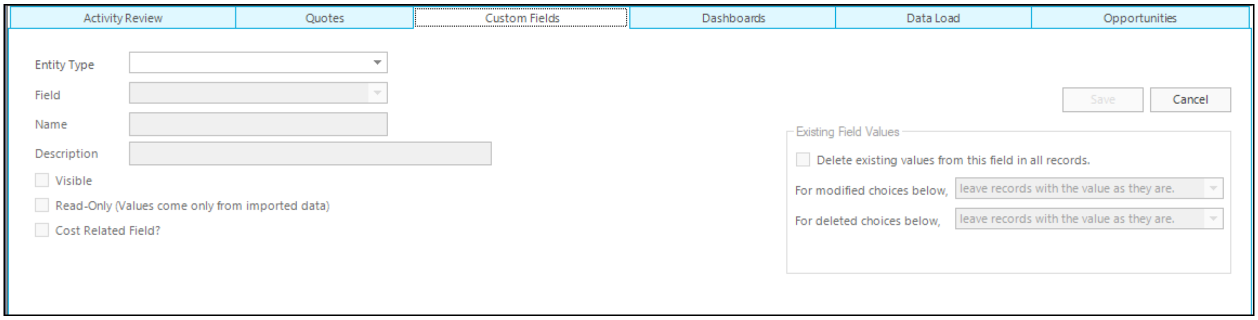
Custom Field management allows Admins to manage custom fields for POS (invoiced sales), Quotes, Open Orders or Opportunitys.

- There are three types of Custom Fields
  - Headers (header/all record information) – available for Invoice, Open Order and Quote header information
  - Line Item (specific data relevant to the part information on the line) – this data applies to all three file types – POS, Orders and Quotes – to ensure consistent an accurate reporting of the item information, regardless of where it is viewed/used in SMP.
  - Opportunitys – this data applies to SMP Opportunitys, and can be linked to Quote Header Custom Fields, if desired.

Each type and field can be personalized with the field's name, description, and a variety of options

- Visible (whether the field can be seen by all users)
- Read-only (meaning values are imported from the organization's business system and cannot be edited by users at all).
  - NOTE: this value will be checked (true) and un-changeable for Invoice Header, Open Order Header, Quote Header, and Line Item Custom Fields, as the data can *only* originate from the imported data from the business system.
- Drop down (meaning admins can define a list of drop down options for the specific fields, from which users can select a value). Once drop down is checked for a given field, the lower half of the screen will be edit-able, allowing the addition of drop down values.
  - NOTE: this value will be unchecked (false) and un-changeable for Invoice Header, Open Order Header, Quote Header, and Line Item Custom Fields, as the data can *only* originate from the imported data from the business system.
- Limit to list (which limits users to ONLY selecting from the list and disables the ability to manually type in a value).

- NOTE: this value will be unchecked (false) and un-changeable for Invoice Header, Open Order Header, Quote Header, and Line Item Custom Fields, as the data can *only* originate from the imported data from the business system.



Customizing the Custom Field(s)

1. Select the entity type from the drop down list
    a. Invoice Header – allows for the addition of custom fields related to the invoice, for use in Part Analysis, Data View or Dashboards.
        i. As noted earlier all Invoice Header fields will be read-only by default.
    b. Line Item (Invoices, Open Orders, Quotes) – allows for the addition of custom fields related to the invoice line-item level (e.g.: additional product/part information) for use in Part Analysis, Data View or Dashboards.
        i. NOTE: custom Line Item fields can also be used as part of the data classification rules for the Product Group Hierarchy.
        ii. As noted earlier all Line Item fields will be read-only by default.
    c. Open Order Header – allows the import of custom fields from the organization's business system relevant to Open Orders.
        i. As noted earlier all Order Header fields will be read-only by default.
    d. Opportunity – allows for the addition of custom fields to SMP Opportunitys.
    e. Quote Header – allows the import of custom fields from the organization's business system relevant to Quotes.
        i. As noted earlier all Quote Header fields will be read-only by default.
2. Once selected, the field box will be select-able. Select the field you want to add/edit.
    a. If starting from scratch, admins should select custom field 1; if adding new fields, SMP suggests selecting the first numbered/available field after other custom fields.
        i. NOTE: Invoice Header, Order Header, Quote Header and Line Item fields provide the option to choose Text, Number or Date fields. Please choose the correct field for your data type – Text fields will be alpha-sortable, Number fields will be ascending/descending sort-able, Date fields will be ascending/descending sort-able by date.
            1. Text Fields appear first (1-25)
            2. Number fields appear thereafter (1-10)
                a. Number fields can further be formatted as Money, Integer (whole number) or Decimals per the Number Format selection box.
            3. Date fields appear at the end (1-10)
3. Name the field and provide a description
4. Select appropriate checkboxes, as necessary:
    a. Visible (whether the field can be seen by all users)

b. Read-only (meaning values are imported from the organization's business system and cannot be edited by users at all)
c. Drop down (meaning admins can define a list of drop down options for the specific fields, from which users can select a value).
d. Limit to list (which limits users to ONLY selecting from the list and disables the ability to manually type in a value)

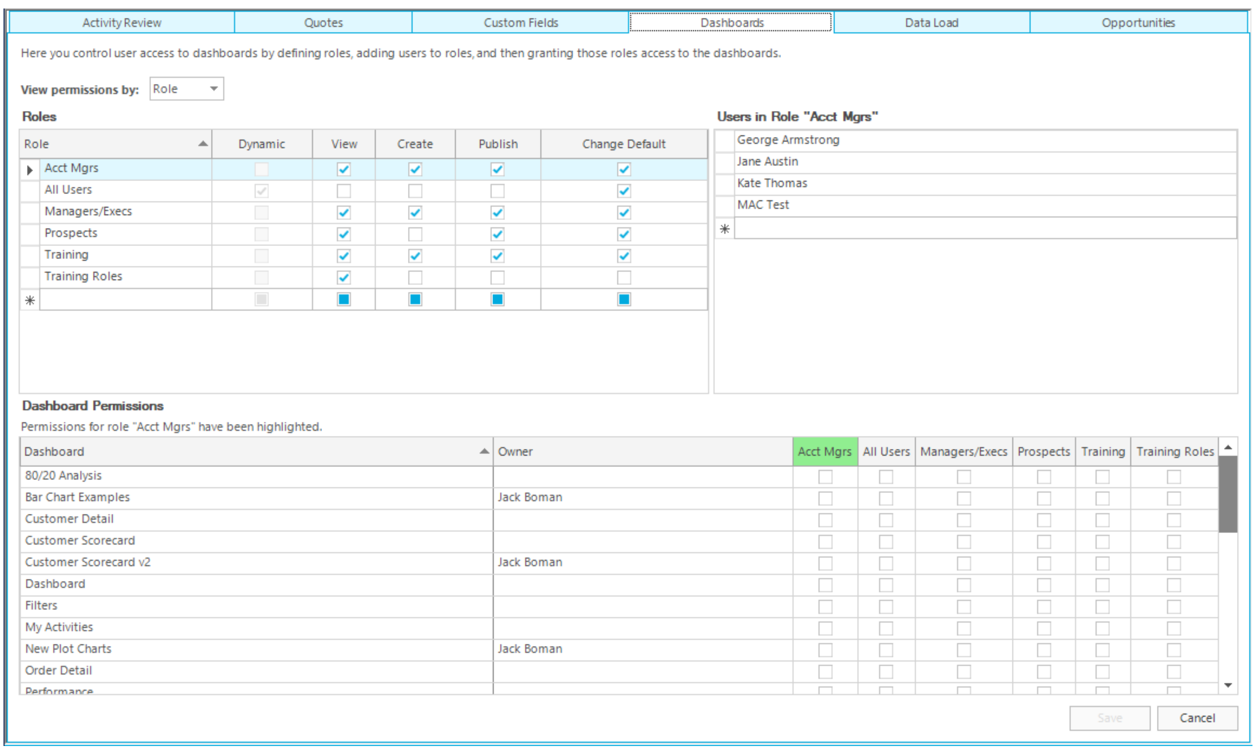
5. If "Drop Down" was checked off as part of Step 4, customize the list by adding values in the Drop Down area (this area will NOT be shown unless the "Drop Down" checkbox is checked.
6. Save changes before moving on, if adding multiple fields. Save button is in the upper right of the screen.
7. Repeat for additional fields, as necessary.

Once the customizations are complete, click "Save" in the upper right.

Dashboards

Please note that Dashboards is a subscription-based add-on to Sales Management Plus; not all client databases will feature this functionality.

All Admin Controls relative to Dashboards are found within the tab named the same. Users must possess "SMP Admin" AND "Employee/User Management" permissions to configure permissions related to Dashboards. Without this privilege, the Dashboard tab will not appear in SMP Admin.



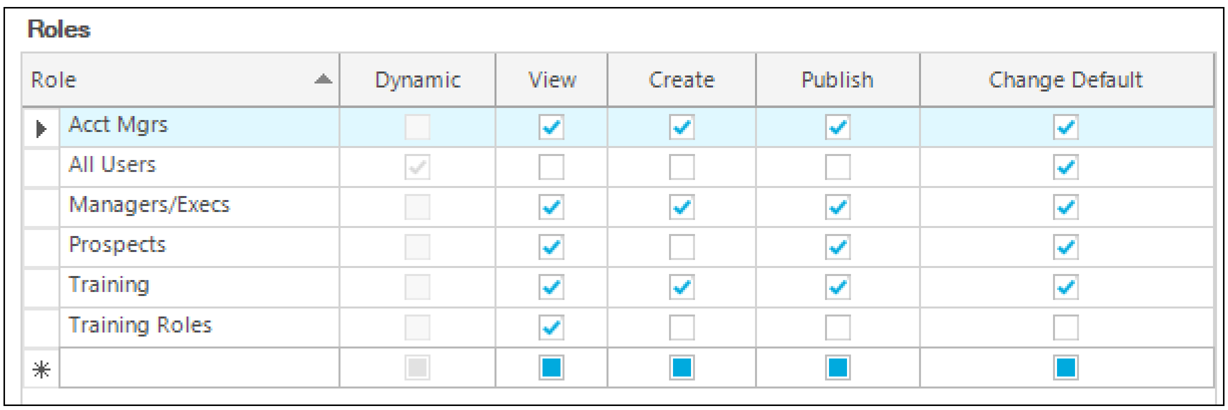
Dashboards Tab

In the SMP Admin subject area, the Dashboards tab allows you to configure user access to the available Sheets. Admins can create roles for users, assign users to those roles, and grant the roles access to the Sheets. Admins can also view permissions by either Role or User.

- By Role – create new roles, delete roles, give Sheet rights to other roles, add and remove role members, and specify which Sheets are available to the roles.
- By User – view the list of users, set a user's default dashboard, view and change a user's roles, and specify which Sheets are available to the roles.

The Roles Grid

The Roles grid is displayed when admins view Dashboard permissions by role. It allows the admin to create, modify, and delete roles. Selecting a role also causes the Role Membership grid (to the right) to display the roles members and causes the Dashboard Permissions grid (below) to highlight which dashboards this role has access to.


Roles

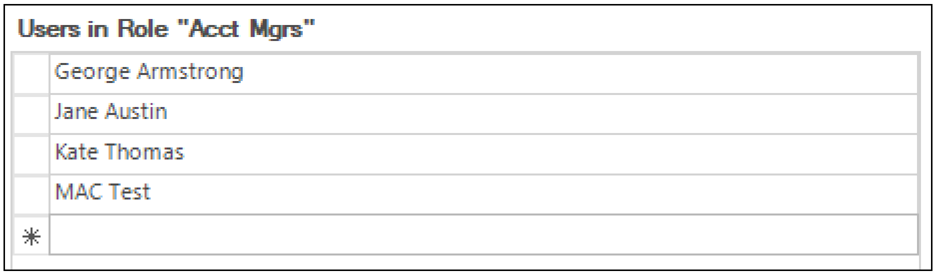
Role	Dynamic	View	Create	Publish	Change Default
Acct Mgrs		✓	✓	✓	✓
All Users	✓				✓
Managers/Execs		✓	✓	✓	✓
Prospects		✓		✓	✓
Training		✓	✓	✓	✓
Training Roles		✓			

Column Definitions:

- Role – This is the name of the role.
- Dynamic – If checked, this is a built-in role with a dynamically determined membership. Admins cannot rename or delete the role or change the role members. However, admins can modify the dashboard rights of the members.
- View – Users in this role will have access to the Dashboard subject area.
    - NOTE: When granting this right to a role, admins should also grant that role access to one or more Sheets. Otherwise, a user in the role would get the Dashboards subject area, but may not be able to see any Sheets (the user will see nothing when opening the subject area).
- Create – Users in this role will be able to create new Sheets.
- Publish – Users in this role will be able to "publish" Sheets that they have created so that you can grant access to those dashboards to other users.
- Change Default – Users in this role will be able to change their default dashboard.

Role Membership Grid

When viewing permissions by roles, the Role Membership grid appears to the right of the Roles grid. The grid displays the current members of the role selected in the Roles grid. Unless the role is dynamic, admins can add or remove users.

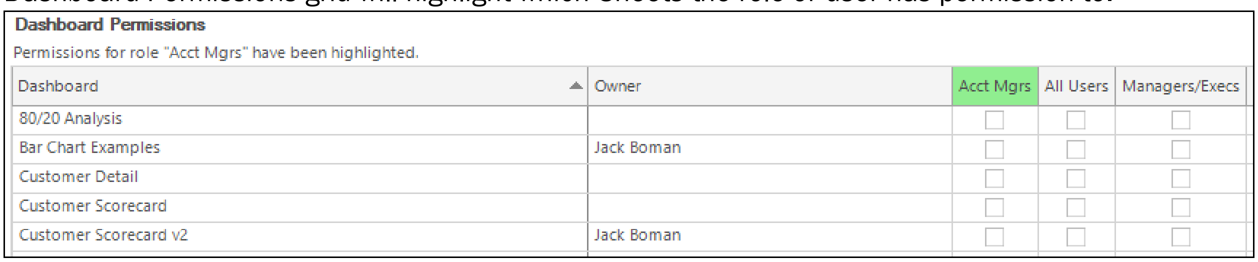


Users in Role "Acct Mgrs"

George Armstrong
Jane Austin
Kate Thomas
MAC Test

Dashboard Permissions Grid

The Dashboard Permissions grid is always visible. It allows admins to order Sheets as they wish and grant roles access to the Sheets. When admins select a row in the Roles or Users grids, the Dashboard Permissions grid will highlight which Sheets the role or user has permission to.



Dashboard Permissions

Permissions for role "Acct Mgrs" have been highlighted.

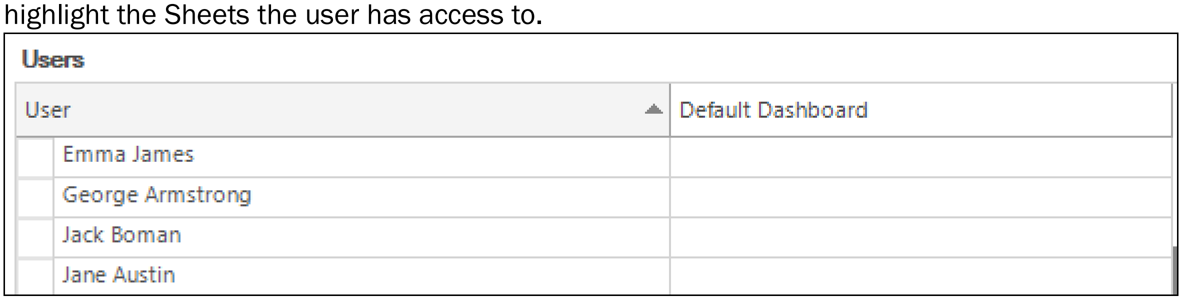
Dashboard	Owner	Acct Mgrs	All Users	Managers/Execs
80/20 Analysis		☐	☐	☐
Bar Chart Examples	Jack Boman	☐	☐	☐
Customer Detail		☐	☐	☐
Customer Scorecard		☐	☐	☐
Customer Scorecard v2	Jack Boman	☐	☐	☐

Column Definitions:

- Dashboard – The name of the Sheet.
- Owner – The user who created the dashboard. Built-in dashboards do not have an owner.
- Sequence – The order in which the dashboards are displayed both in this grid and in the top left dropdown of the Dashboards subject area.
- Role columns – There will be column for each role defined. Checking the checkbox in a role column gives members of that role access to the Sheet.

Users Grid

The Users grid appears when you view permission by user. It lists the users and allows you to set their default dashboard for each user. Selecting a user also causes the User Roles Grid (to the right) to display the roles the selected user is a member of and causes the Dashboard Permissions grid to highlight the Sheets the user has access to.



Users

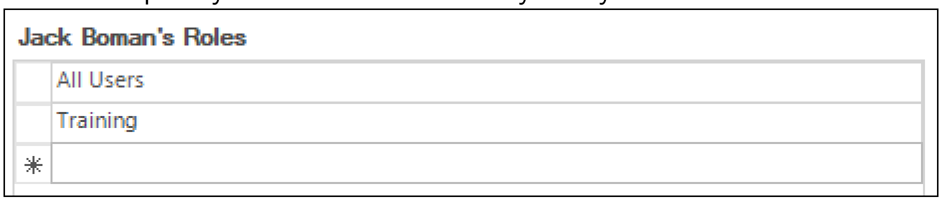
User	Default Dashboard
Emma James	
George Armstrong	
Jack Boman	
Jane Austin	

Column Definitions:

- User – The name of the user.
- Default Dashboard – The users default dashboard. You can assign a default to each user.

User Roles Grid

When viewing permission by user, the User Roles grid is displayed to the right of the Users grid. It lists the roles that the selected user is part of. Admins can add and remove roles for the user. Note that you cannot remove a dynamic roles (such as All Users) from the list of roles. The user's membership in dynamic roles is defined by the system.



The Save and Cancel Buttons

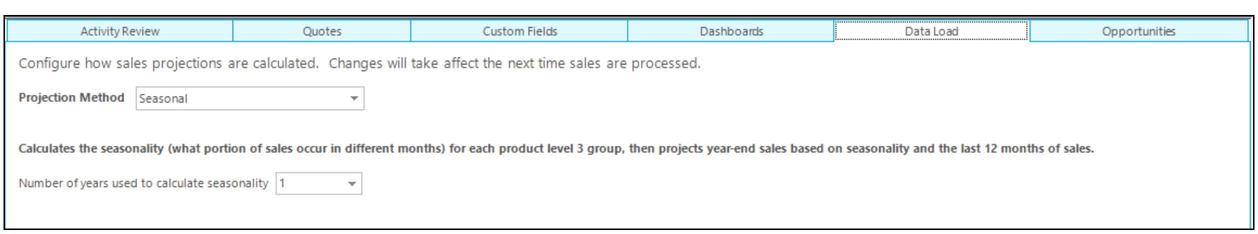
Save/Cancel buttons are located at the bottom right of the Dashboards tab.

Changes are not applied until you click the Save button. Clicking Cancel will discard your changes and reload the grids. Changes that you make may take a few minutes to be enforced.

NOTE: A user who has just been granted permission to view dashboards will also have to log out and back into SMP for the Dashboard subject area to appear.

Data Load

The Data Load tab allows Administrators to configure how Projections are handled within SMP. Please note: to access this tab, the user must have "Administrator" and "Batch Processing" permissions. If the Admin does not have the required permission, he/she can contact the SMP Account Manager for further assistance.



Projections options are as follows:

- Annualized YTD (which is the current default for all databases)

    - This method estimates yearend sales by annualizing the existing YTD sales. Future sales are assumed to be at the same rate as sales already achieved for the year.
- Seasonal
    - This method calculates seasonality (what portion of sales occur in different months) for each product level 3 group, then Projections year-end sales based on the seasonality and the last "X" months of sales. Projections are then summed/rolled up to the level 2 and 1 product groups to provide a total Projections for a given customer. This may also be termed in some organizations as "weighted" Projections.
        - Admins can choose number of years to be used in the seasonality calculations – from one to five years, per the provided dropdown.
            - **NOTE:** newer client databases may not have five years of history; if this is the desired method, the Admin should contact the SMP Account Manager to discuss sending additional historical sales data.
        - Choosing the number of previous years to include in the calculation of seasonal Projections allows a company to make internal decisions based on sales trends within their specific organization (e.g.: two years ago was an unexpected poor sales year, so perhaps only last year should be used; or four years ago the company was recovering from recession, so the last three years should be used).
- Once the method and number of years (if necessary) has been selected, the admin will need to save changes at the lower right corner of the form.

- It is important to note that once changes have been made, Projections will not be immediately updated. One of two things must occur to trigger Projections to update:
    - When new sales data is processed into the database (e.g.: from nightly upload of POS data from the ERP).
    - When sales are reprocessed using the Data Load subject area.
        - This would be used in test databases where data from the ERP is not being transmitted/retransmitted to the test environment.
            - **NOTE:** A user must have "Administrator" and "Data Load" permissions to reprocess sales. If the Admin does not have the required permission, he/she can contact the SMP Account Manager for further assistance.

Downloads

The Downloads page is accessible to all users of Sales Management Plus who have valid login credentials. From this page, users can do the following:

- Download the SMP client to their computer
- Download PDF copies of SMP-related documentation
- Access archived basic and advanced training webcasts, and their related documentation

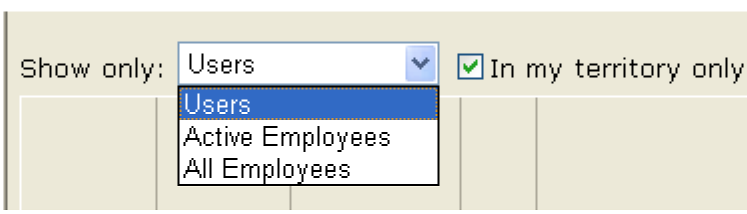
Employee & User Maintenance

- Add/Edit/Deactivate/Reactivate employees
- Search for an employee
- Grant and change permission to users
- Edit the employee/user information by clicking on the employee ID
- Change a users password and login
- Define the SMP package for the user: *SMP Pro* or *SMP Lite*

Adding an Employee/User

Employee Detail:

1. Users have the ability to edit the Employee/User section of the SMP Admin tool if they have:
    a. Permission access level equal to or greater than the user they are trying to add/edit
2. Users can choose to view "Users" only (have SMP Logons), "Active Employees" only or All "Employees" based on the 'show only' drop down.



3. Users can sort any of the columns (ascending or descending order) by clicking on one of the following column headers (NOTE: clicking on the column header again will reverse the sort direction):
    a. Employee ID
    b. First name
    c. Last name
    d. Initials
    e. Employee Type
    f. Branch
    g. Territory
    h. Active employee
    i. User of the SMP application
    j. Login Name
    k. Package: Pro vs. Lite

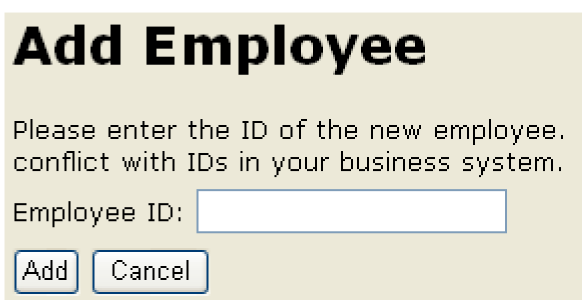
l. Permission Levels (see Permissions Level section for more information) – Yes/No
    i. SMP Admin
    ii. Terr/Branches
    iii. Emp/Users
    iv. Product Groups
    v. Batching
    vi. Selection Lists
    vii. Profile Fields
    viii. Can View Cost
    ix. Can Run Data Load
    x. Can Configure Extractor
    xi. Can Run Mailers
    xii. Outlook Agent Allowed
    xiii. SMP Mobile Access Allowed

4. Users need to complete the following actions when adding an employee:
    a. Set the employee up with the correct information that correlates to their company's business system
    b. Make the Employee ID (unique identifier for each employee) the same as what is in the business system; if the ID already exists in the SMP Web Admin Tool, then the user will need adjust the Employee information currently tied to that ID, or enter a new, unique ID.

To Add a New Employee,

5. Click on the "Add Employee" button 

6. The tool will first ask the user to insert the Employee ID
    a. This ID should be the same as the one in your business system
    b. If the ID is not in the business system, then create one that does NOT conflict with the IDs in the business system



    i. Once you hit the "Add" button after entering the Employee ID, the SMP Admin tool will automatically open the Employee Detail page

TROUBLESHOOTING: If the user enters an Employee ID that already exists in the SMP Admin tool, then the program will alert the user that the ID has been previously created. The user will have to alter the Employee ID in order to ensure it is in the application as a unique identifier.

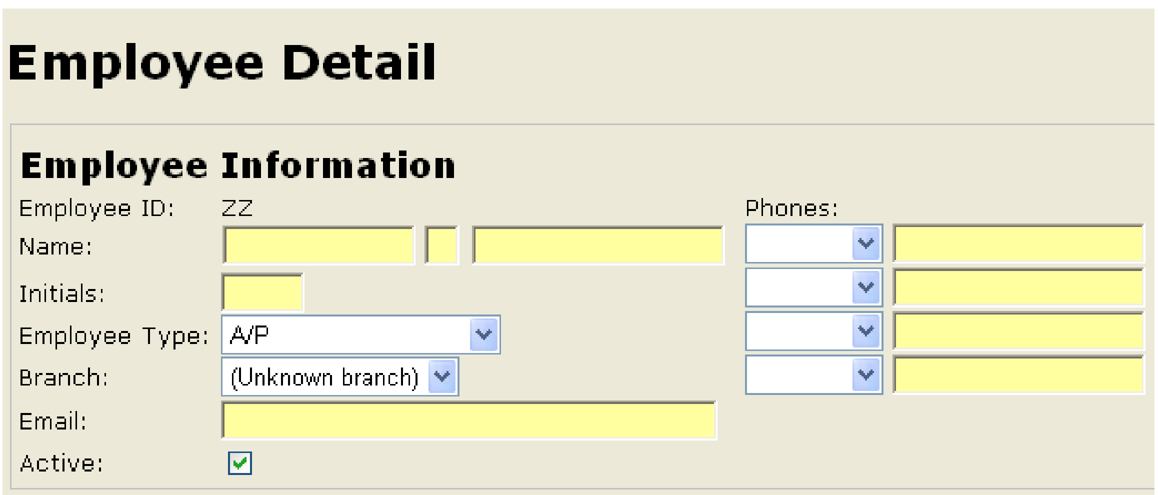
ii. Enter or Select the Employee information – this section is used to view/configure information for all employees

1. Name
2. Initials
3. Employee Type (the group that the employee works with)
4. Branch

NOTE: If the current user only has access to one branch, then that branch will be selected as the new employee's branch. Otherwise, the branch will be blank and the user must select a branch from the list.

5. Phone numbers
6. "Active" is checked by default

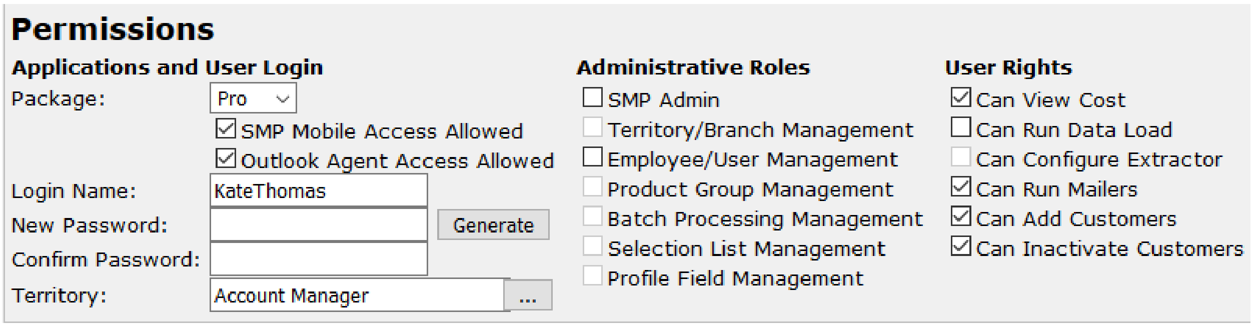
NOTE: To deactivate an employee from the SMP application, uncheck the "Active" box.



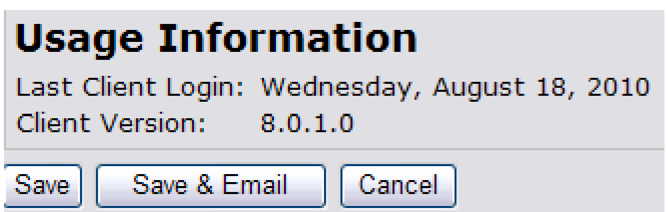
iii. Define the permissions for the Employee if that person is going to be a user of SMP

1. Select the SMP package they will be using: *Pro* or *Lite*
   NOTE: SMP Lite only includes Companies, Activity Management and Opportunity Add/Edit portion of the software application – Lite users will not have access to Advanced Reporting, regardless of checkbox options under "Permissions".
2. Enter their Login Name (i.e. TomSmith)
3. Click the "Generate" button to automatically produce a password (This is based on the password rules/restrictions set in the Password Policy management section) or the user can enter their own password based on the restrictions previously set
4. Select the appropriate Territory level that the user should fall under
   NOTE: The default is "Account Manger"; this provides a salesperson access to all accounts that are assigned to him/her. If a salesperson

needs additional account access, you may use the “Additional Customer Access” tab to set up access to accounts that are *not* assigned to that salesperson. See section on Additional Customer Access.



iv. Save the employee information that the user has entered
  1. If you are entering a new User, they will need their Login information emailed to them
     a. You must have the correct email address for that employee
     b. You must have the Login Name and the New Password fields completed
  2. Click Save & Email to send the new user their SMP logon information NOTE: The SMP Logon information comes from the email address support@gosmp.com. If the user does not receive the login info, then he/she should check their junk mail box.



v. Once the user hits the “Save” button for the new employee or the “Save & Email” button for the new user, the new employee will be added to the Employee/User list

NOTE: If an employee is granted a login, then the SMP Admin should generate a unique login name for the user from their name. The key here is that the login name is unique. If another user exists in the system with the same name, then the SMP Admin will have to alter the default login name in some way (i.e. adding a number to the end of the name) to make it unique.

Permissions Level Definitions

- SMP Admin
  - Users with SMP Admin rights can make changes to Customer information in the SMP application, e.g. Account Manager and Branch assignment
- Territory/Branch Management
  - SMP Administrators with territory and branch permissions can make changes to their company’s territory hierarchy using the SMP Admin tool

- Employee/User Management
  - SMP Administrators with employee and user permissions can make changes to their company's employees and/or users of SMP using the SMP Admin tool
  - SMP Administrators can set up a new SMP user or change a current SMP user's password, or grant permissions to a user
- Product Groups
  - SMP Administrators with product group permissions can make changes to the company's product hierarchy (i.e. add new product codes) using the SMP Admin tool
- Batch Processing Options
  - SMP Administrators can control what customer information in SMP is updated from their Customer master file
- Selection Lists
  - SMP Administrators with selection lists permissions can make changes to the company's selection lists, which further customizes their SMP application
- Profile Fields
  - SMP Administrators with profile fields permissions can make changes to the company's selection lists, which further customizes their SMP application
- Can View Cost
  - SMP Administrators can control whether users can see Cost amounts in SMP
  - By default, this option is checked for all SMP users – meaning they <u>will</u> be able to view the Costs in the SMP application
  - SMP Administrators can choose to hide this value from user(s) by un-checking the box associated with "Can View Cost" and saving changes.
- Can Run Data Load
  - SMP Administrators can control which users have access to see/use the Data Load subject area, which allows for manual posting of new Customer/Contact/POS data and reprocessing of data already loaded into SMP.
- Can Configure Extractor
  - SMP Administrators can control which users can access and manage the data extractor
  - User must have permissions to Data Load in order to see this option. It will be a menu option in the upper left corner of Data Load, if permission is granted.
- Can Run Mailers
  - SMP Administrators can control whether users can access Mailers, which allows users to create marketing lists, send e-mail communication out to a group of contacts, or export contacts to spreadsheets, labels, etc.
  - By default, this option is checked for all SMP users – meaning they <u>will</u> be able to access Mailers.
    - Note that SMP Lite users, regardless of the checkbox option for Mailers, will not have access to this subject area.
- Outlook Agent Allowed
  - SMP Administrators can control which users can use the Outlook Agent.
    - To add/remove user permissions for the Agent, check or uncheck the box and save changes.
  - Once a user has been granted access to Outlook Agent, an Outlook Agent tab will appear in Web admin for said user. From this tab, the user can access the installer.
  - **NOTE:** Users who are not checked off with permissions to Outlook Agent can choose to install the Agent, but will not be allowed to validate user credentials and use the Agent.

- SMP Mobile Access Allowed
  - SMP Administrators can control which users can use the Outlook Agent.
    - To add/remove user permissions for Mobile, check or uncheck the box and save changes.
  - Once a user has been granted access to SMP Mobile, an SMP Mobile tab will appear in Web admin for said user. From this tab, the user can gain details for how to download the Mobile app for their particular device.
  - **NOTE:** Users who are not checked off with permissions to SMP Mobile can choose to install the application, but will not be allowed to validate user credentials and use it.

Editing Permissions

Basic Security Rule: A User may only grant permissions that he has. This rule results in the following:

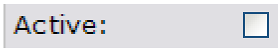
- If users are not in a role (none of the permission boxes are checked), they cannot grant that role to others nor can they revoke them
- Users cannot give others access to a territory that they do not have access to themselves
- Users cannot edit the permissions of a user assigned to a territory to which they do not have access
- Users cannot edit the login related fields of any user that has permissions that the current user lacks.
- Users cannot edit the login related fields of their own account (except the email address) since modifying these fields while the user is logged in could cause conflicts.
- Users can only edit employees within their territory. If the employee is assigned to a branch outside the current user's territory, the user may view, but not edit the employee's information.

TROUBLESHOOTING: When users cannot edit some or all of the fields, the page will include a note indicating why the fields are not editable by that particular user.

When login permissions are revoked, the system will clear the user's roles and remove the user's SMP logon. This can be done by selecting "None" for the SMP Package, which revokes the logon permission. The employee will still remain active in your system but they no longer have access to the SMP application. NOTE: by changing the user's permissions to None, the Admin utility will automatically un-check the user's ability to use Outlook Agent and/or SMP Mobile, if permissions were present.

When this occurs, the next time the user opens Outlook and the Outlook Agent attempts to connect, data will be removed from Outlook and then a message will be displayed indicating the user no longer has access right to SMP Outlook Agent.

Likewise, if the user logs into SMP Mobile on the PDA, a message will be displayed indicating the user no longer has rights to access SMP from a PDA.



When a user's "active" flag is un-checked, the user's SMP permissions will be revoked automatically, as will any access to Outlook Agent and/or SMP Mobile, per descriptions above. In addition, this will remove a user from drop down lists within SMP, provided the user does not have any related data associated to him/her. E.g.: in Market Analysis, the user's name will not show up on the Account Manager drop down UNLESS the user still has Companies assigned. If items are assigned, a parenthetical indication of "inactive" will appear after the user's name. The user's name will remain on the drop down list until all items are reassigned to another user.

If a user tries to log into SMP after their active flag is unchecked, OR after their SMP permissions have been set to None, then a message will be displayed indicating the user no longer has access rights to SMP.

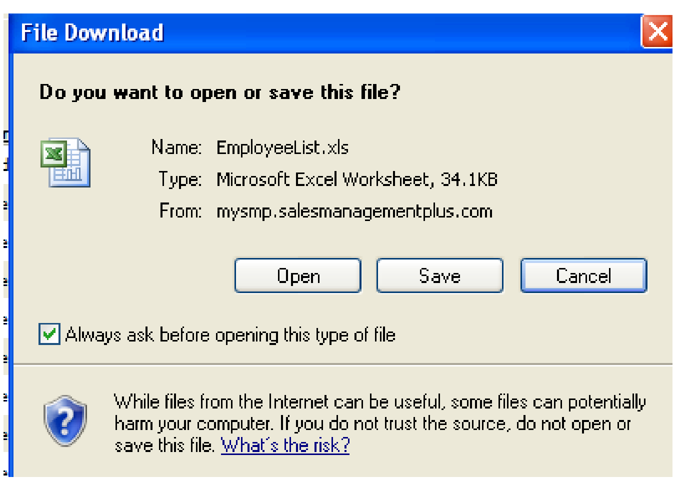
Exporting Employees

Administrators have the ability to export the information in the employee grid to an Excel file from within SMP.

- Log into SMP using your standard SMP login credentials.
- Click Reports
    - Select "Employees" from the Categories List
    - Select "Employee List" from the Reports List
- Select the desired type of data from the dropdown lists.
- Click Run in the upper left of the screen.

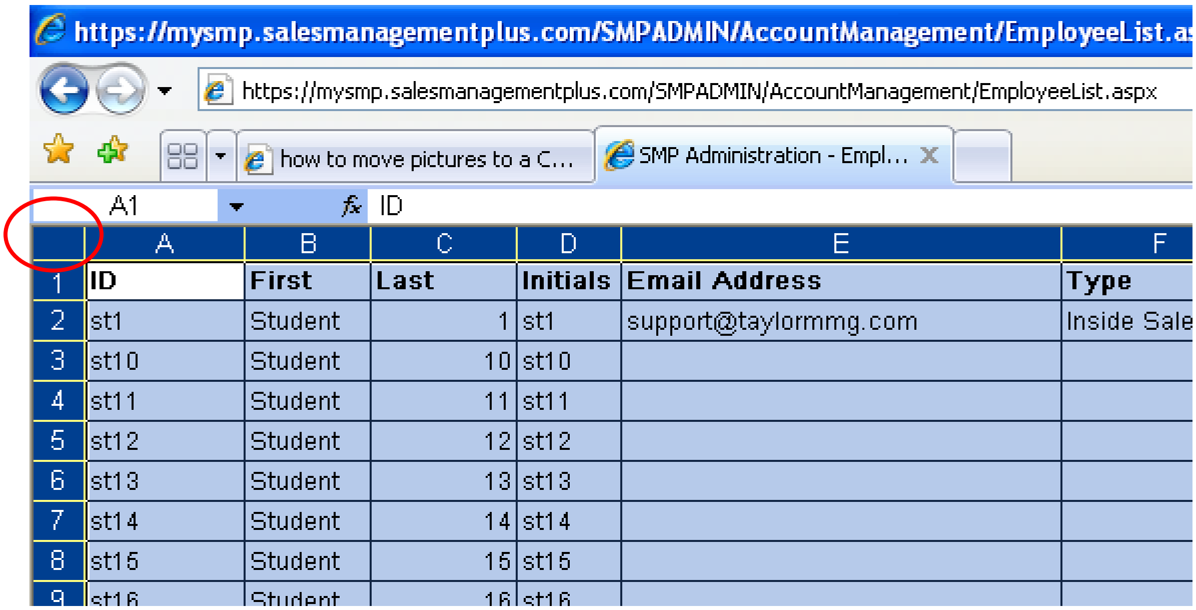
Alternatively, Administrators have the ability to export the information in the employee grid to a CVS file. Click on the following button:

The program will ask you if you would like to Open or Save the Employee List:



Click Open and employee information that is currently displayed in the Employee & Users page (Users only, Active Employees only, or All Employees) will open in the internet site. You can then copy the information and paste it into Excel.

- Click on the blank box (circled in Red) in the upper far left corner of the data sheet
- **NOTE:** if the browser will not support the download of the list from within the Web Admin tool, Administrators may download it directly from the SMP database, per previous instructions.



	A	B	C	D	E	F
1	ID	First	Last	Initials	Email Address	Type
2	st1	Student	1	st1	support@taylormmg.com	Inside Sale
3	st10	Student	10	st10		
4	st11	Student	11	st11		
5	st12	Student	12	st12		
6	st13	Student	13	st13		
7	st14	Student	14	st14		
8	st15	Student	15	st15		
9	st16	Student	16	st16		

- Right click and Copy the information or use your key strokes and click Ctrl+C
- Open up Excel and then click on the first cell in the spreadsheet (A1). R. Click and paste the information or use your key strokes and click Ctrl+V.
- You can now sort the information or use your Auto Filter.

SMP Mobile

The SMP Mobile tab and page will be visible to any user who has been granted rights to use SMP Mobile on the Employee Detail Screen.

☑ SMP Mobile Access Allowed

Users can access this page to get necessary instructions for downloading SMP Mobile to their PDA.

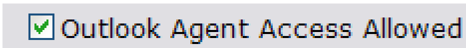
Users will have the option to download

- SMP Mobile for Blackberry, which allows the user can enter the e-mail address of their Blackberry and have the install link e-mailed direct to their Blackberry for easy download.
- SMP Mobile for iPhone, which gives the user instructions for locating the SMP Mobile download via iTunes app store.

NOTE: Users who install SMP Mobile in a PDA device, but do not have stated permissions for SMP Mobile will receive an error when they attempt to log in from their PDA device, indicating they have insufficient permissions to access SMP via a mobile device.

Outlook Agent

The Outlook Agent tab and page will be visible to any user who has been granted rights to use Outlook Agent on the Employee Detail Screen.



Users can access this page to access the installer link for the Outlook Agent.

Users who install the Outlook Agent, but do not have stated permissions for Outlook Agent will receive an error when they attempt to log in from the Agent, indicating they have insufficient permissions to access SMP via a Outlook.

Password Policy Maintenance

SMP Administrators can edit the password policy in a way that is similar to how it is currently set up in SMP. It is important to have a good password policy to make sure that your data remains available to those who should have access to it, but isn't accessible to others. Password policies can provide the following protection:

- **Strong Passwords:** When users select their own passwords, they often do not pick very good passwords. This can be avoided either by assigning strong passwords that won't allow users to change their passwords or by requiring that passwords meet certain minimum requirements. This is where *minimum length* and *requiring digits* and *mixed case* come in. It prevents users from simply using "easy-to-guess" passwords such as their login name or birthday.

- **Changing Passwords:** Users aren't supposed to let other people know their passwords, but it still happens. Sometimes an employee may learn a manager's password and be able to log in as the manager. Other times, an employee may leave the company but still be able to log in with someone else's account. To protect against this, it is important that passwords are changed from time to time. Changing passwords requires two things:

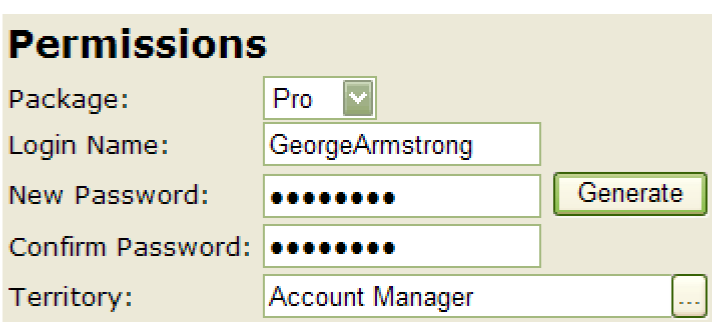
  1. First, passwords should expire from time to time
  2. Second, users should not reuse old passwords

There are three options for managing your password policy:

Standard SMP Password Policy

a. SMP recommends using this policy; it is a secure set up for passwords
b. Passwords must be at least **6** characters long
c. Users may not reuse any of their last **3** passwords
d. Passwords expire after **90** days
e. Passwords must contain a mix of digits and upper and lower case letters
f. Users may change their passwords

NOTE: When setting up a user's SMP permissions, hit the "Generate" button for the New Password and the program will automatically produce a password following the guidelines above.

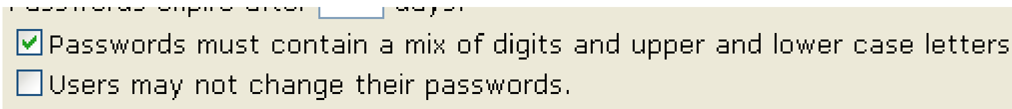


Established Passwords

a. Users can continue to use their established passwords and cannot changed them
b. This is beneficial if your company is using assigned passwords

Custom Password Policy

a. Users can set how many characters they want their passwords to contain
   NOTE: Users can use a minimum of 4 characters here
b. Users can set how many passwords the employees can go through before they can reuse their last one
c. Users can set the number of days the password should expire
d. Users have the option to select the following options by checking the box:
   i. Passwords must contain a mix of digits and upper and lower case letters
   ii. Users may not change their passwords, which is beneficial if company is using assigned passwords



Territory & Branch Maintenance

- Add/Edit/Merge/Deactivate/Reactivate branches
- Add/Edit territories
- Assign branches to territories
- Designate a default branch for new employees (This is used when the system cannot determine the new employee's branch.)
- Designate a default territory for new branches

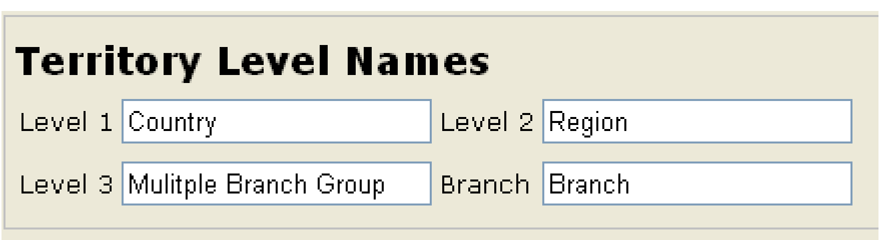
Users may not normally add branches or territories, more than likely SMP Administrators will use this to edit the branch/territory information or rearrange the territory hierarchy. If the branch/territory being added is in the company's business system, then the branch should be created automatically when we process your POS data. Times when users do want to add branches manually would include the following:

- The branch does not exist in the your business system because
  - It is a branch that doesn't have sales, but does have employees.
  - It is a branch that doesn't really exist (e.g. Virtual Branch), but you want to assign "employees" to it, such as vendor reps.
- The branch is in your business system (or will be), but doesn't have any sales or Companies yet.

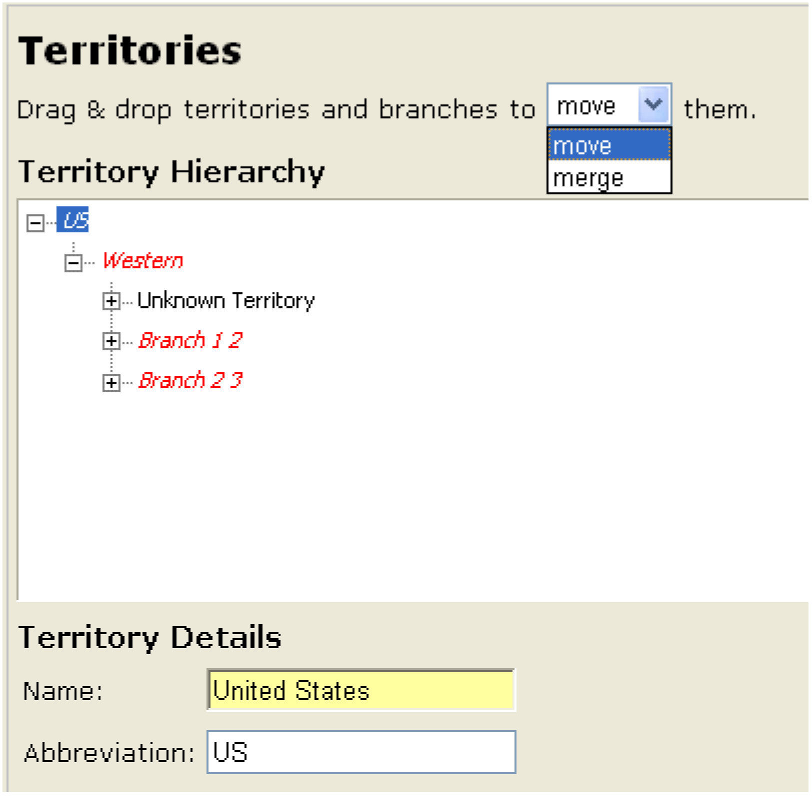
If the branch is or will be in your business system, then enter the same branch ID that you use in your business system. Otherwise, SMP won't know it's the same branch when you eventually pass us the branch ID in the POS data.

If the branch is not in your business system, then create an ID that is different than the types of IDs you have in your business system. For example, if you number your branches, then use letters for the ID. If all your branches have 4 letter IDs, then you might use a 6 letter ID.

There are four Territory Levels that the user can edit and name. These four levels indicate how the territory hierarchy is set up.

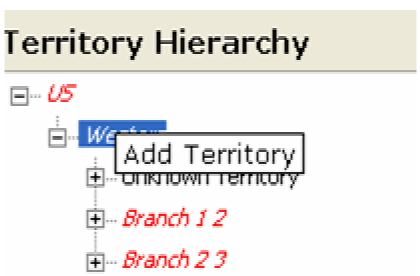


The middle of the screen shows the user how the Territory Hierarchy is laid out. Users can move, reorder and merge territories by dragging and dropping; but, remember to select "move" or "merge" in order to achieve the action. Users can view the details of a territory by clicking on one of the territories on the list.

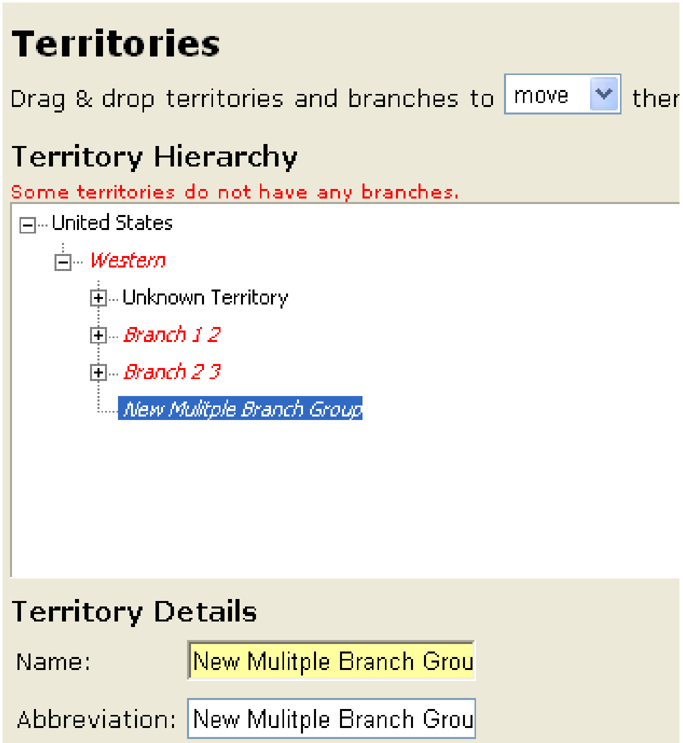


To Add a Territory to the Territory Hierarchy,

1. Right click on the Territory level that you wish to add a territory under

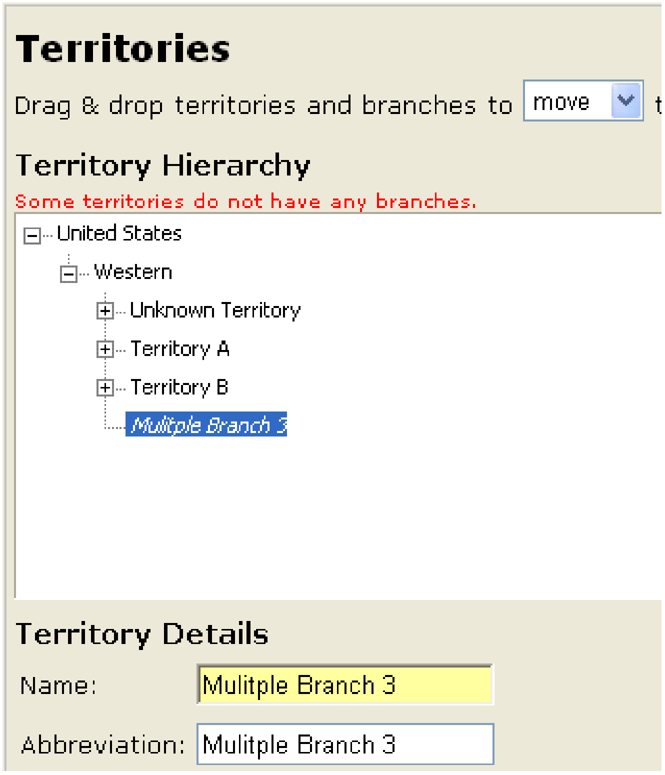


2. The “Add Territory” selection will pop up over that territory for you to select
3. After the user clicks on “Add Territory”, a new branch will display under the territory you selected



NOTE: The SMP Admin tool will alert the user if any territories exist without branches that fall under them. Also, if the territories have an "Abbreviation" but no "Name" they will be highlighted in "Red" as well. In the SMP Admin tool, the user can identify issues by noticing these "Red" highlights.

4. Under the Territory Details, give the new territory a "Name" the new territory and give it an "Abbreviation"
   a. Users can rename territories by selecting the territory to show its details

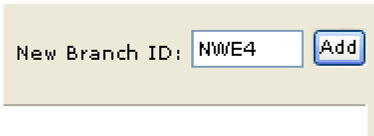


NOTE: Users cannot edit/delete an “Unknown” territory or branch. If a user clicks on the Unknown territory or branch to show its details, the Name and Abbreviation will be shown as gray. However, users can merge an Unknown territory or branch into another.

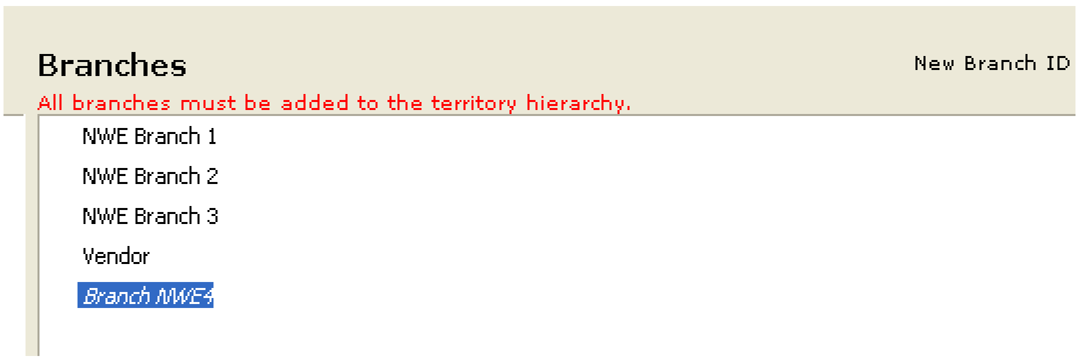
5. After adding a new territory, users will want to add branches that fall under that territory group

To Add a Branch,

1. Enter a Branch ID in the branch ID field
    a. This must contain letters and numbers only
    b. There can be no spaces between each variable



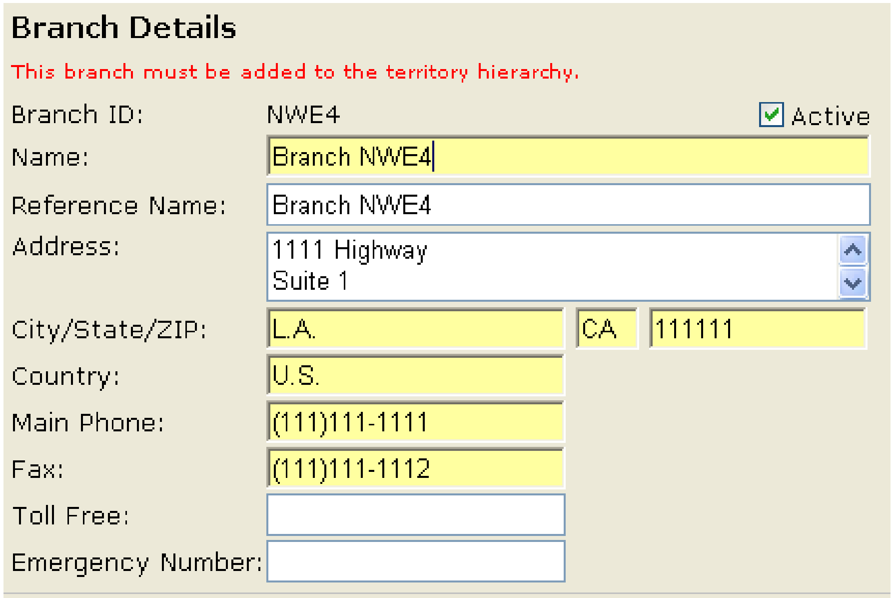
2. Click Add and the new branch will be added to the list of Branches



NOTE: The SMP Admin tool will alert the user to the fact that there are branches which need to be added to the territory hierarchy. Users must add ALL of the branches to an existing territory/region as part of the territory hierarchy.

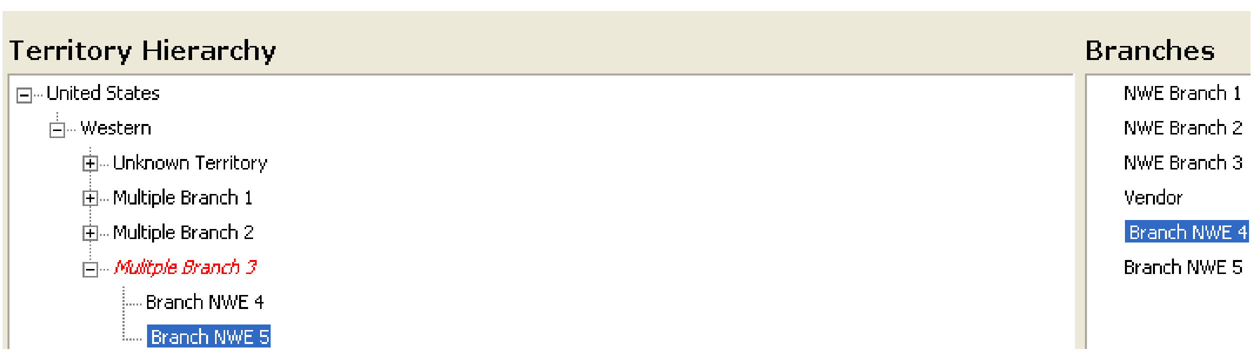
3. After adding the new branch to the list, the Branch Details will open with the following fields for the user to complete:
    a. Branch Name
    b. Branch Reference Name
    c. Address (NOTE: There can be only two lines for the address)
    d. City, State and Zip code
    e. Main Phone
    f. Fax
    g. Toll Free Number & Emergency Number if necessary

NOTE: Users can deactivate and reactivate a branch if needed by un-checking or checking the “Active” box under the Branch Details.



4. Now click on the new branch and drag it over to the Territory Hierarchy
    a. Once you choose the territory you wish to put the branch under let go of you mouse over that territory name
    b. Branches can exist in multiple areas, just drag that branch more than once to the territories it should be under
    c. Users can remove a branch from a territory by dragging it out of that territory list and back to the branches list or under another territory if it exists some where else NOTE: There cannot be a duplicate of the same branch under a particular territory
    d. Once the branch exists in the Territory Hierarchy, users can merge or move them around

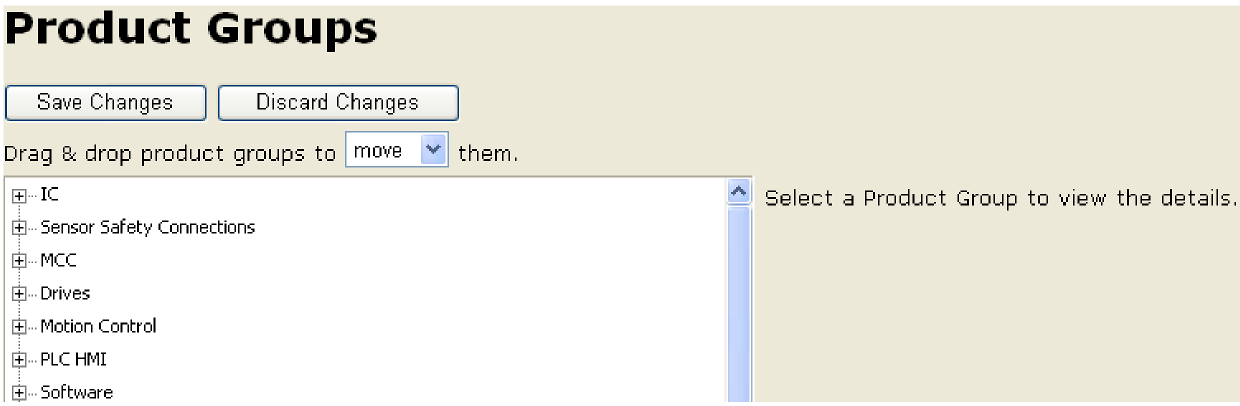
NOTE: Any territories or branches that have been deactivated will be shown as gray on the list, but they will <u>not</u> be completely removed from these lists.



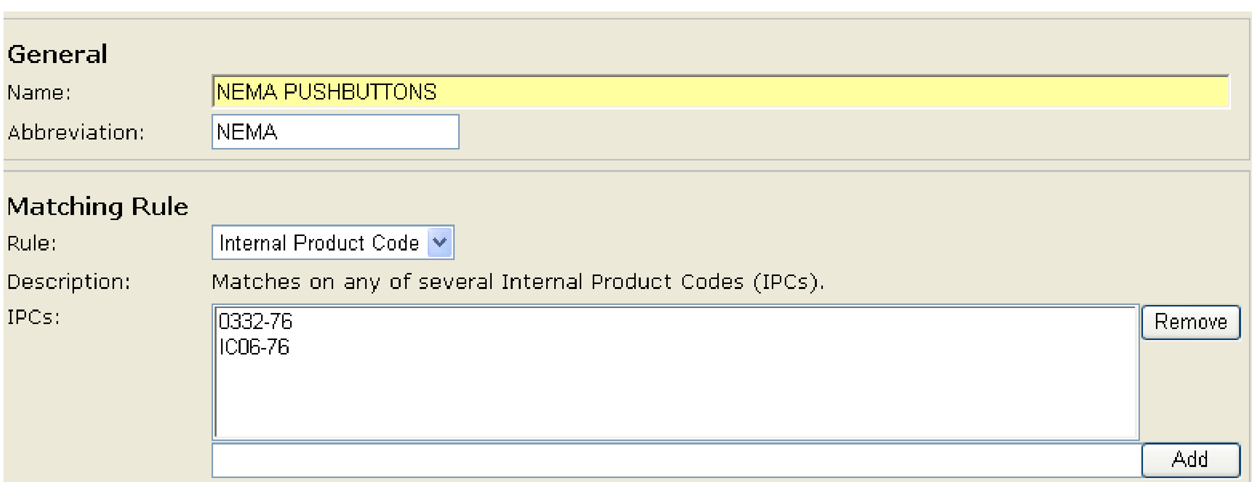
***NOTE: Users' changes should not be committed until they are done editing. They can discard their changes if they wish to "delete" everything they just did. If any territory has no branches, the user will be informed of this through highlighted "Red" alerts when trying to save their changes. The user cannot save the changes until those issues are resolved.**

Product Group Maintenance

- Add product group
- Move or merge product groups within the same product level
- Manage item codes (for each product)
- Specify vendor default groups
- Export product group hierarchy to a template
- NOTE: When adding/editing product groups in your hierarchy, SMP must be informed so the correct monthly data can be reprocessed in SMP.



When users select a product group, the General Information for the product group (including the “Name” and “Abbreviation”) and the Matching Rules section will be populated for the selected product group. The Matching Rules section is only displayed for product level 3 groups.



Matching Rules

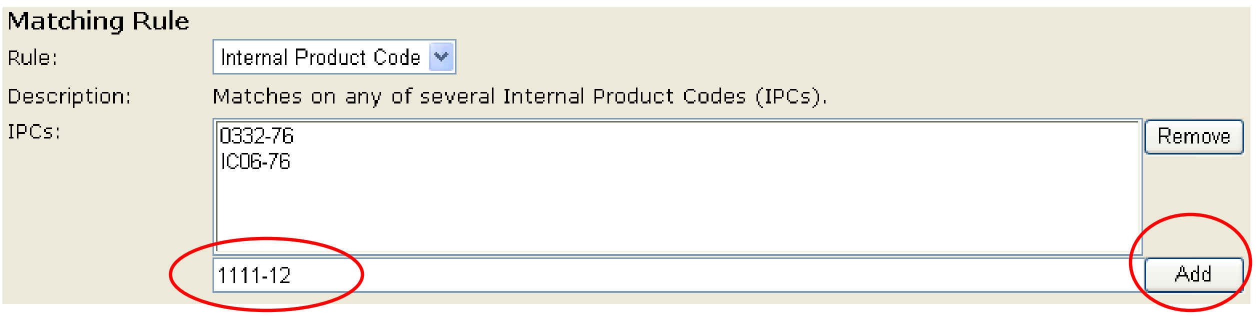
"Matching Rules" are the product level type values in the application. The selected matching rule will determine the following:

- The match fields that are displayed
- What their labels are
- If the Vendor IDs are displayed (only displayed for the "Internal Product Code" or IPC rule)

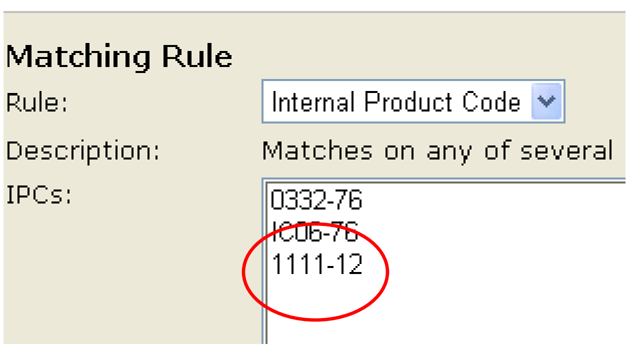
Users are able to add new groups at all three product levels.

To Add a Product,

1. Type in the Internal Product Code in the field (circled in Red below)
2. Click "Add" (circled in Red below)

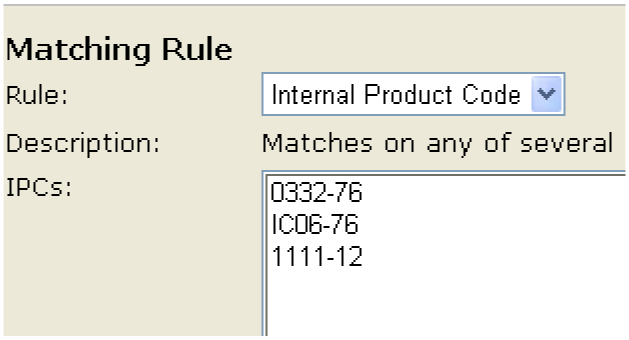


3. The application will add the new product to the IPC list which will fall under the Product Level 3 group that is currently selected from the hierarchy and displayed in the General Information
4. NOTE: When adding new IPCs to the product hierarchy, click *Save Changes* for every 5 new product codes added. After saving the changes, the user can continue making additions.



When users change the matching rule, the values for the match fields should be cleared. They may have a different meaning under the new rule. Users can add codes or IDs to the list as well as remove them. When the IPC rule is selected and the user adds a code or ID that is used by another product group with the IPC rule, the user will be informed of the conflict and asked if he/she wants to move the code to this product group.

Users are able to move, reorder and merge product groups by dragging and dropping. Level 3 product groups can only be merged if they have the same matching rule and the same value. Users must select the "move" or "merge" option when applying this action to the product groups.



The “Other” product level groups cannot be renamed or merged into another group.

Selection List Maintenance

- Add/Edit/Delete options
- Delete option and clear data (this means that the data is cleared in the records of your SMP application)

There are three types of selection lists that are used in different places in the SMP application and serve different purposes.

Suggestion Lists

- Used to suggest values to users, such as activity subjects
- Serve as a “template” which the user can modify

Category Lists

- Used to categorize data

Other Lists

- Lists of business entities, priorities etc.

The Selection Lists application screen includes the following:

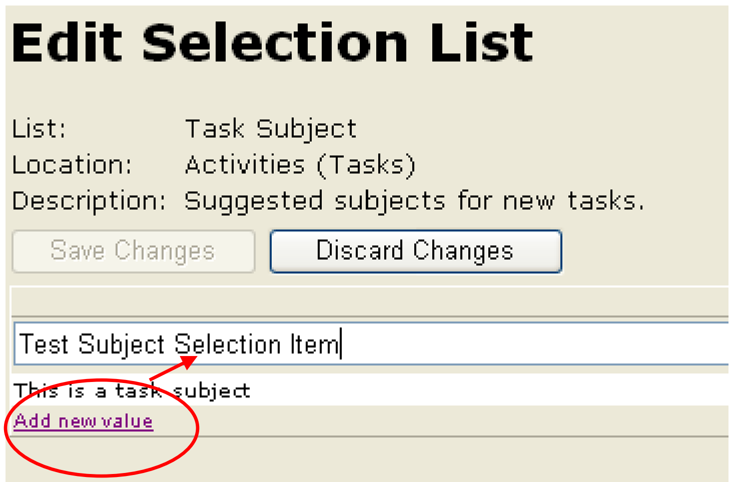
- Name (name of the item that users can add values/options to)
- Where Used (where the item is used in the SMP application)
- Description (details of the item)

Selection Lists

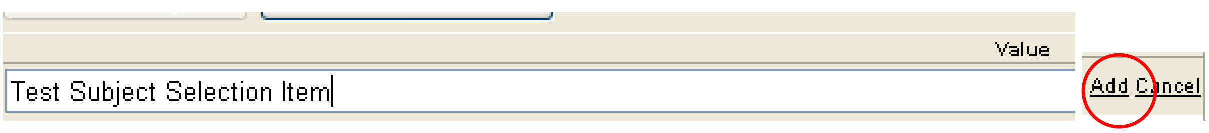
Name	Where Used	Description
Billable Activity Category	Activities (Phone Logs, Customer Meetings)	The list of categories for tracking billable activities.
Competitors	Customers, Projects	A list of your competitors that can be associated with a customer ac
Customer Meeting Subject	Activities (Customer Meetings)	Suggested subjects for new customer meetings.
Employee Group	Employees	An employee's functional role, such an “Accnt Mngr”. Some values h
Information Request Subject	Activities (Information Requests)	Suggested subjects for new information requests.
Joint Sales Program	Activities (Customer Meetings)	The active joint sales call programs that employees should track wh
Phone Call Log Subject	Activities (Phone Call Logs)	Suggested subjects for new phone call logs.
Phone Type	Employees	The types of phone numbers an employee may have, such as “Car
Post-Sales Activity Category	Activities	The list of post-sales categories for activities.
Pre-Sales Activity Category	Activities	The list of pre-sales categories for activities.
Project Priority	Projects	The different priority levels a project can have.
Project Status	Projects	The different status names a project can have.
Project Type	Projects	A classification of projects.
Task Subject	Activities (Tasks)	Suggested subjects for new tasks.
TCO Category	Activities (Phone Logs, Customer Meetings)	The list of categories for reductions in total cost of ownership.
Vendor Sales Rep	Activities (Customer Meetings)	Vendor sales reps that can go on joint sales calls.

To open and edit one of the selection list items,

1. Click on the Name of the item you wish to edit or add options (values) to
    a. The SMP Admin tool will display the list name, but it will also explain to the user where the list comes from and how to configure it in SMP
2. The application will open a new screen so users can add values to the selection list for that particular item
3. Click on "Add new value" and enter in the name of the value

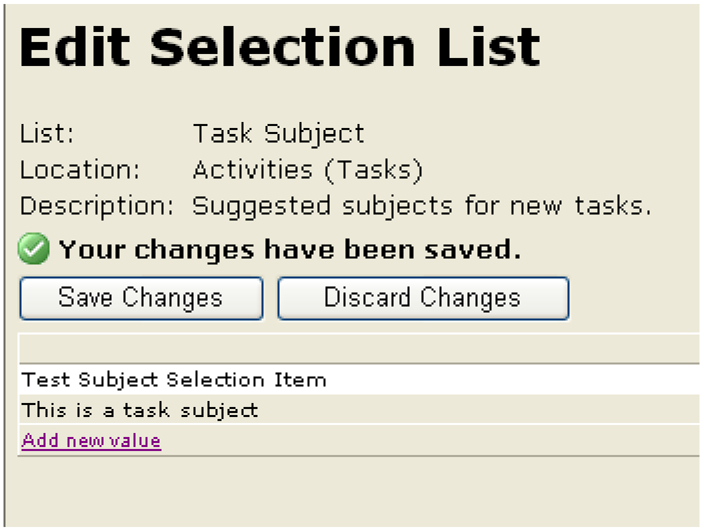


4. After you enter the name in the appropriate field, click "Add" at the end of the new value. This will add the new value to the selection list.



5. After adding the new value to the list, users have the option to "Edit" the value or "Delete" it all together from the selection list

6. Once you have added the necessary items, click "Save Changes" in order to apply these values to your SMP application
    a. The application will notify users if the values were successfully added and saved

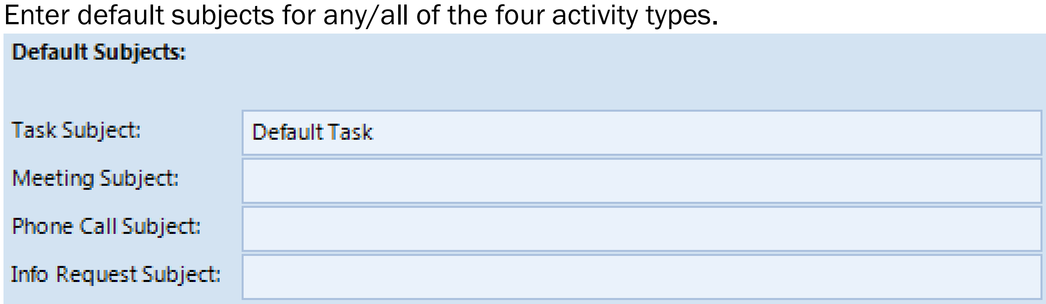


7. The user has the option of saving the changes or discarding the change Made

Managing Default Values for Activities

Administrative users now have the option to add/manage default Subject values for all four activity types. This is managed by logging into SMP on the desktop and selecting the “SMP Admin” button on the lower left of the subject area list.

1. The Activities tab should be the default view; if not, be sure to select the tab called “Activities Review”
2. Enter default subjects for any/all of the four activity types.



   a. **NOTE:** if the value should be exactly reflective of an existing suggested subject value defined in WEB Admin, be sure to copy/paste it from the WEB admin site.
3. Click Save to save changes; click cancel to cancel changes
   a. Admin users may edit the defaults at any time by entering the SMP Admin tab, editing values and saving changes. This can be especially helpful during high-volume activity-logging periods, such as annual planning, vendor roundtable events, etc.
   b. To REMOVE defaults, delete values and save changes.

***NOTE: There is a timeout value, so save changes often when working in this application. In other words, do not wait to “Save Changes” after adding too many values, such as more than five or six new values.**

Profile (Programmable) Fields

- Show/Hide fields
- Rename/Name fields
- Specify the data values within the profile fields
- Select/Edit the profile field's settings
- Includes the four customer profile fields
- Includes the three contact profile fields

Users are presented with a list of the profile fields that include the following:

- Visibility
- Name (label such as "Cust Type")
- Location
- Profile Field number
- Whether or not the profile field is Queryable
- Field Type (Text or Checkbox)

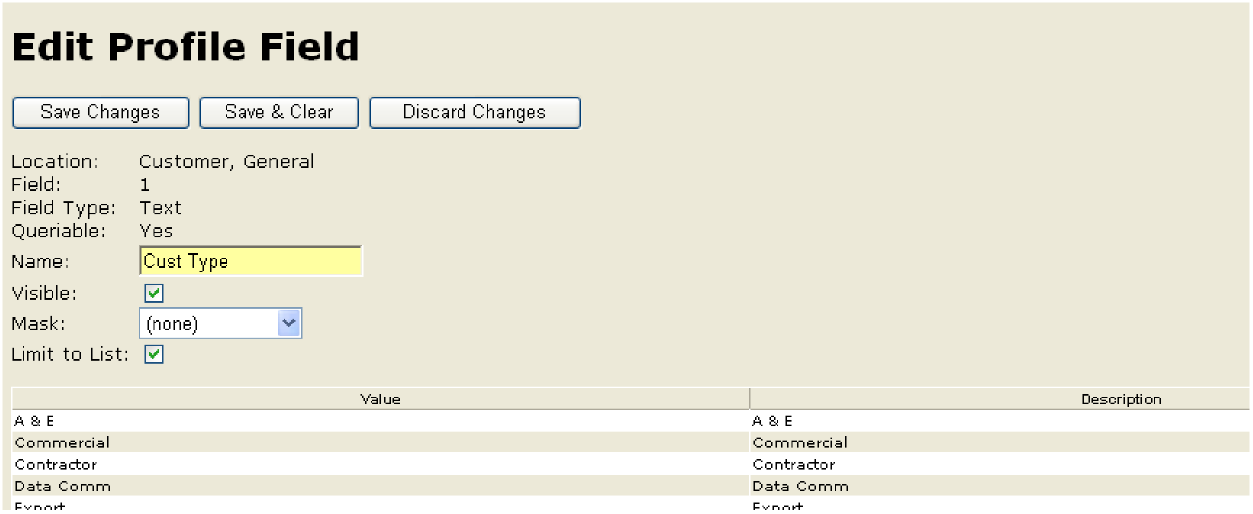
Profile Fields

Select from the following profile fields to edit a field's settings:

Visible	Name	Location	Field	Queriable	Field Type
☑	Cust Type	Customer, General	1	☑	Text
☑	Industry Type	Customer, General	2	☑	Text
☑	Acct Mode	Customer, General	3	☑	Text
☑	Target Prgrm	Customer, General	4	☑	Text
☑	Text 1	Customer, Info & Notes Tab	1	☐	Text
☑	Text 2	Customer, Info & Notes Tab	2	☐	Text
☑	Text 3	Customer, Info & Notes Tab	3	☐	Text
☑	Emergency Phone	Customer, Info & Notes Tab	4	☐	Text
☐	Text 5	Customer, Info & Notes Tab	5	☐	Text
☑	Number 6	Customer, Info & Notes Tab	6	☐	Text
☑	Number 7	Customer, Info & Notes Tab	7	☐	Text
☑	Number 8	Customer, Info & Notes Tab	8	☐	Text
☐	Number 9	Customer, Info & Notes Tab	9	☐	Text
☐	Number 10	Customer, Info & Notes Tab	10	☐	Text

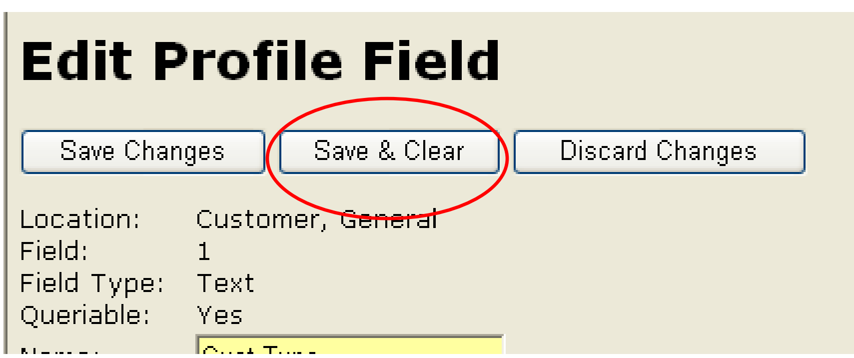
To open and edit the values under a profile field,

1. Click on the item "Name" and the SMP Admin tool will open the "Edit Profile Field" screen
2. Users can change the name of the queryable field as well as add values



3. Click on “Add New Value” to add more options to this particular item

4. Users are given the option to clear out all the data in the current field in the SMP application (only if it contains data)
    a. Users need to click on the “Save & Clear” button to remove all the completed fields in their SMP application. This button saves your changes in the SMP Admin tool and deletes all data from the profile field for all Companies or contacts.
    b. The values will still exist in this SMP Admin tool; however, all the values under this particular profile field will be removed from the SMP application field
    c. If you are setting up a new profile field (or it was previously hidden) you would want to select this option. You wouldn’t want to show a previously hidden field and discover that some records had leftover garbage in them.

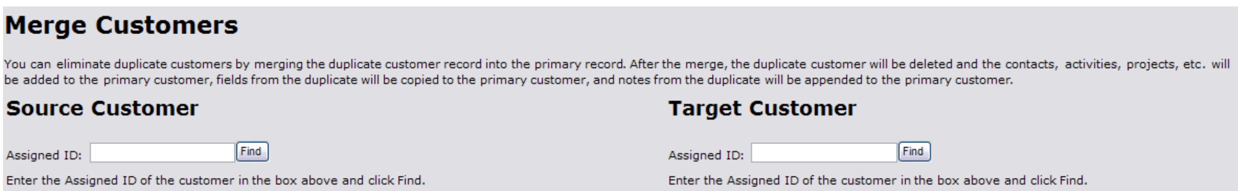


Customer Merge

Users have the ability to merge two Companies together via the web admin utility. The SMP Administrator will need a Customer ID or a Customer name for the two Companies to be merged to perform the merge. The customer being merged will be deleted from the SMP application. The merge functionality is intended merge a temp customer with a permanent one, or an old customer with a new one.

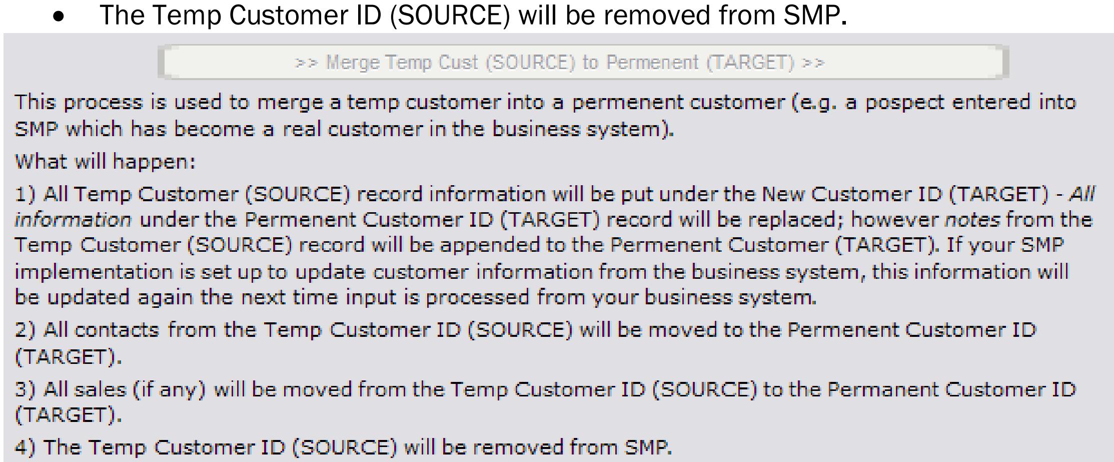
Helpful hints:

- **The SOURCE customer is the one that will be deleted permanently from SMP.**
- **The TARGET customer is the one that will remain in SMP.**

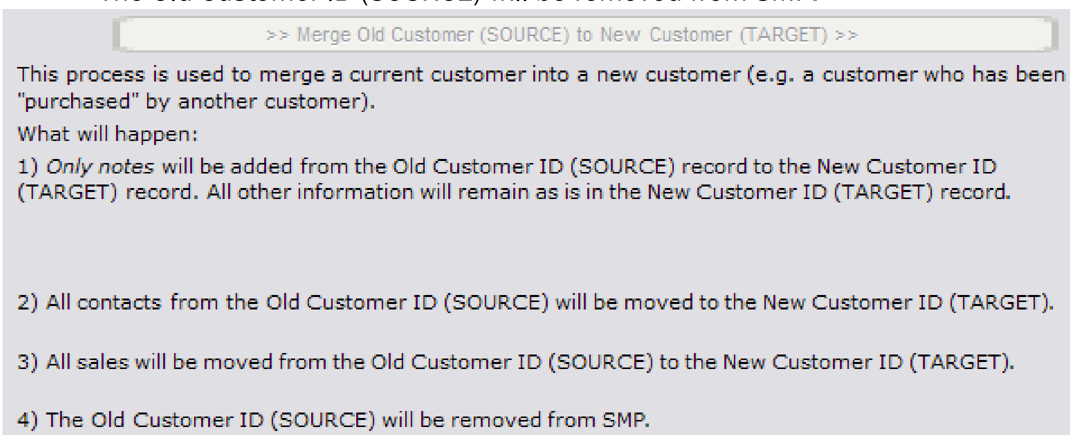


Options and Process for Merging Companies

1. <u>Option One:</u> (found on the left hand side of the Merge Companies screen). This allows users to merge a TEMP customer INTO a PERMANENT CUSTOMER (e.g. a Prospect entered into SMP which has become a Purchasing Customer in the Business System). In this scenario, the following will happen:
   - All Temp Customer (SOURCE) record information, including Customer name and Div/Ref name, will be put under the New Customer ID (TARGET). - *All information* under the Permanent Customer ID (TARGET) record will be replaced; however *notes* from the Temp Customer (SOURCE) record will be appended to the Permanent Customer (TARGET).
     i. If your SMP implementation is set up to update customer information from the business system, this information for the TARGET customer will be updated again the next time input is processed from your business system.
   - All contacts from the Temp Customer ID (SOURCE) will be moved to the Permanent Customer ID (TARGET). All sales (if any) will be moved from the Temp Customer ID (SOURCE) to the Permanent Customer ID (TARGET).
   - The Temp Customer ID (SOURCE) will be removed from SMP.



2. <u>Option Two:</u> (found on the right hand side of the Merge Companies screen). This allows users to merge a Current customer into a New Customer (e.g. a customer who has been "purchased" by another customer.). In this scenario, the following will happen:
    - *Only notes* will be added from the Old Customer ID (SOURCE) record to the New Customer ID (TARGET) record. All other information, including Customer name and Div/Ref name, will remain as is in the New Customer ID (TARGET) record.
    - All contacts from the Old Customer ID (SOURCE) will be moved to the New Customer ID (TARGET).
    - All sales will be moved from the Old Customer ID (SOURCE) to the New Customer ID (TARGET).
    - The Old Customer ID (SOURCE) will be removed from SMP.



Once the user has determined the appropriate method of customer merge to use,

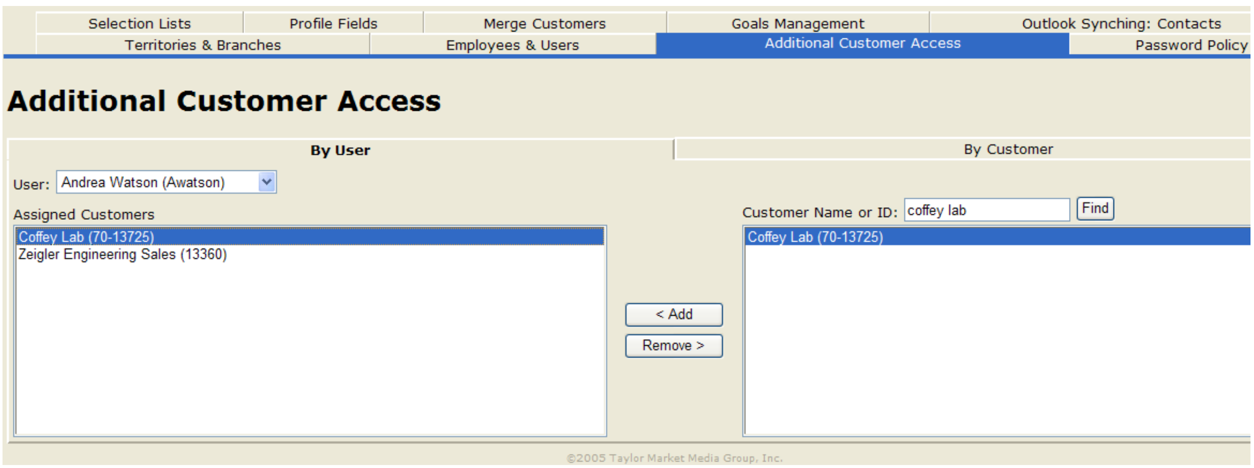
1. Find and enter the Assigned ID of the Source Customer
2. Find and enter the Assigned ID of the Target Customer
3. Validate the correct customer information has been displayed for both the “Primary” and the “Duplicate” customer, click the “>>Merge>>” button

Additional Customer Access

SMP now gives you the option to have multiple account access. This means that more than one account manager can see the same customer. Also, administrators can grant specific users access to accounts that do not currently exist under their territory or account manager permissions.

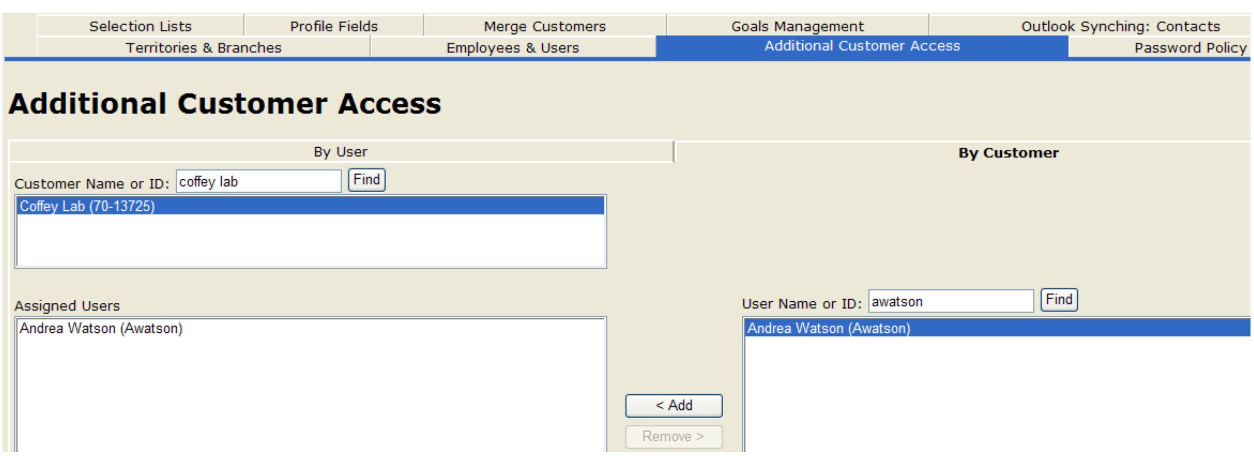
In order to set this up, select either the account manager you would like to grant multiple Companies to, or the customer you would like to show to more than one account manager.

To grant multiple account access By User, choose the account manager (user) and the customer you like that user to see, and then click "Add".



To remove a customer from being viewed by the account manager, click on the customer to highlight it, and then click "Remove".

To grant multiple account access By Customer, choose the Customer name and the account manager (user) name or ID. Be sure to select the customer and user name (both should be highlighted) and then click "Add".



To remove an Assigned User from having access to a customer account, click on the user name to highlight it, and then click "Remove".

Goals Management

SMP Administrators can now lock current year and next year goals and potentials in SMP. Once the goals and potentials are locked, the users can no longer go into the Goals form in SMP and make changes to their numbers. Administrators also have the ability to unlock goals and potentials, and save their Goals to the Data Warehouse for Advanced Reporting purposes.

To Save Current SMP Goals to the data warehouse, click the appropriate button displayed in the screen below. Note that users need to save goals <u>each</u> time they are edited. SMP recommends that SMP Administrators save current goals and "lock" them for the year, and re-save goals if they are unlocked in order to allow users to edit goals later. Advanced Reporting will only pull the goals data based on what has been saved to the Data Warehouse, thus users must save their goals after making changes to ensure accurate reports.

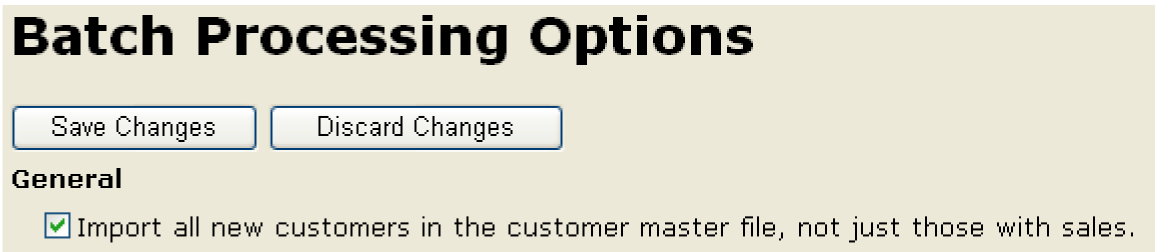
To Lock Current Year SMP Goals or Next Year SMP Goals, click on the appropriate button displayed in the screen below.

To reverse the action and Unlock SMP Goals, click on the appropriate button displayed in the screen below.

Batch Processing Management

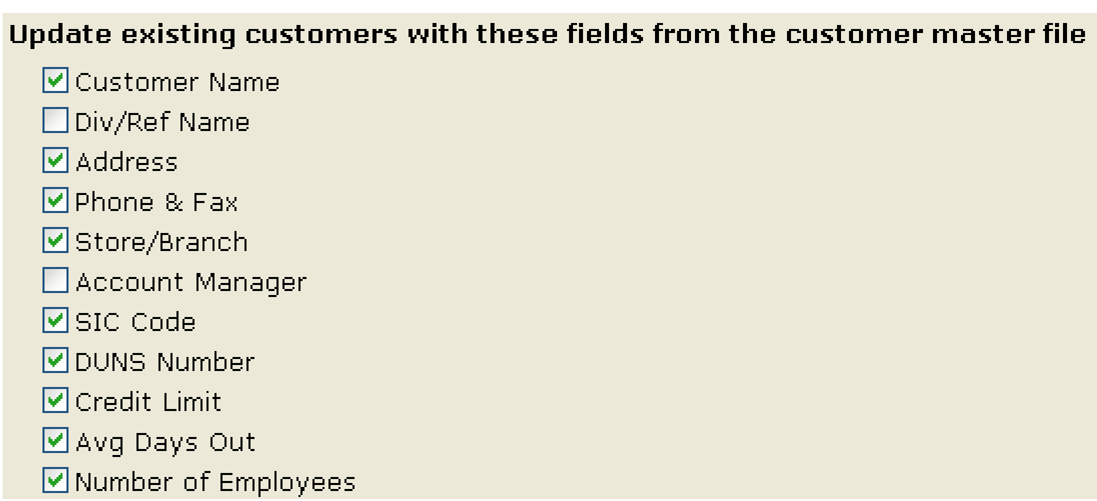
- View and Edit your batch processing options
- Users can select batch processing options in order to update their SMP application from their business system
- The options that are selected in this application will allow the Customer Master extract from the business system to override the corresponding information in the SMP application

Users have the option to import *all* new Companies in their customer master file, and not just those Companies with sales.



Users have the option to update the existing customer with the following fields from the Customer Master file:

- Customer Name
- Reference Name
- Address
- Phone & Fax
- Store/Branch
- Account Manager
- SIC Code
- DUNS number
- Credit Limit
- Average Days Out
- Number of Employees



Users have the option to update the existing Companies with the profile fields from the Customer Master file. The list of profile fields includes the field's number and name (i.e. "Field 1 – Customer Type"). Fields not used in the SMP application will include the text "not shown" after the field's name.

Update existing customers with these profile fields from the customer master file

- [x] Customer, General Field 1 - Cust Type
- [x] Customer, General Field 2 - Ind. Type
- [x] Customer, General Field 3 - Accnt Mode
- [x] Customer, General Field 4 - Pri Ctrls / Targ
- [x] Customer, Info & Notes Tab Field 5 - T-Shirts
- [x] Customer, Info & Notes Tab Field 6 - (not shown)
- [x] Customer, Info & Notes Tab Field 7 - (not shown)
- [x] Customer, Info & Notes Tab Field 8 - (not shown)
- [x] Customer, Info & Notes Tab Field 9 - (not shown)
- [x] Customer, Info & Notes Tab Field 10 - (not shown)
- [x] Customer, Info & Notes Tab Field 11 - (not shown)
- [x] Customer, Info & Notes Tab Field 12 - (not shown)
- [x] Customer, Info & Notes Tab Field 13 - (not shown)
- [x] Customer, Info & Notes Tab Field 14 - (not shown)
- [x] Customer, Info & Notes Tab Field 15 - (not shown)

Outlook Synching: Contacts

SMP allows users to synchronize MS Outlook (Contacts and/or Tasks) with the Sales Management Plus software. There are several one-way models for synching with SMP, and the synchronizing models have improved duplicate detection and a simplified duplicate resolution screen. As the SMP Administrator, you will need to select what options your users have for synching, and then set those parameters via the Web Admin SMP Admin tool. **NOTE:** Outlook Synching: Contacts is a different methodology than using the Outlook Agent (separate install/add-in). Users will NOT be permitted to use Outlook Agent AND synching inside Sales Management Plus, regardless of options selected in this section by the SMP Administrator.

Overview of New Synching Options

1. No Contact Synching: users will NOT be able to sync contacts, but WILL be able to sync tasks.
    a. This will prevent your users from inadvertently pulling their contacts into Outlook while synchronizing their tasks.
2. SMP To Outlook Only: one-way synching that will update and/or add SMP contacts for selected Companies to the users' Outlook Contacts folder.
    a. Users will need to update/add contacts in SMP before synching. Changes made in the user's Outlook Contacts will be overwritten if they deviate from what is displayed in SMP.
3. Exchange Public Folder to SMP & SMP to Outlook: allows you, as an administrator, to synchronize SMP with contacts from a public Exchange folder. Salespeople and regular users can then synch their Outlook contacts from SMP.
4. Add New Outlook Contacts to SMP & SMP to Outlook: this allows users to synch one way.
    a. New Outlook Contacts to SMP allows user to update SMP with new contacts from Outlook that did not previously exist in SMP
    b. SMP to Outlook (as described above) will update and/or add SMP contacts for selected Companies to the users' Outlook Contacts folder.
5. Bidirectional (NOTE: only available in applications created before June 2007): this is the old method of synching; users can synch both from SMP to Outlook and from Outlook to SMP. This combination is deprecated and is being replaced by the other combinations.
    a. Bidirectional synching can sometimes yield unexpected results for users; this is the old method not recommended for use moving forward.

SMP recommends that you follow these guidelines to help you select the most appropriate synching method for your organization:

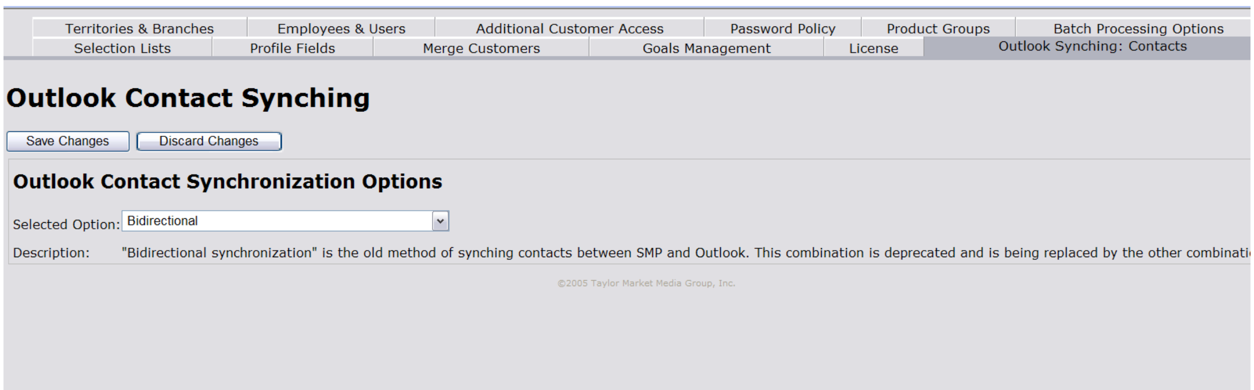
1. Come to a business decision regarding what will be your Contact "master" – will it be your SMP application or will it be your Exchange Server Contact Folder (if applicable). You may also choose to let your business system be the "master" and track all contacts in your business system. You can then send SMP a contact file each month when you send your transactional data, and we can process it for you (note: if you would like to select this option, please contact your SMP Account Manager to discuss format, etc.).
    a. For non-Exchange users, you can use SMP as your Contact master, or if you prefer, you may track all contacts in your business system and let it be the "master." You can then send SMP a contact file each month when you send your transactional data, and we can process it for you (note: if you would like to select this option, please contact your SMP Account Manager to discuss format, etc.).
    b. If you choose to let SMP be your master, internally, develop a process for updating your contacts in SMP – will just the Account Managers be responsible for updating contacts for their assigned Companies, or will any user with access to a customer (e.g.: an Inside Salesperson or Sales Manager) make those changes?

2. Review the options for synching and determine the best one that meets your needs.
3. Set your options using the SMP Web Admin tool
4. Communicate what options are available to your users – you can send the Outlook Synching instructions on our Web site to your users so they have an easy how-to guide at their fingertips (http://www.salesmanagementplus.com/Training/OutlookSynching_6.31.pdf)

Setting Outlook Synching Models for Your Users

SMP Administrators now have the ability to choose what synching models are available to all users. These synching models can be set using the SMP Web Admin SMP Admin tool.

1. To set Outlook Synching options for your users, log into the SMP Web Admin tool and select the "Outlook Synching: Contacts" tab.



2. Using the dropdown box, select the synching option your company would like to make available to SMP users.
3. Save Changes and alert users to the new options available for Outlook Contact Synching

Custom Toolbar Buttons

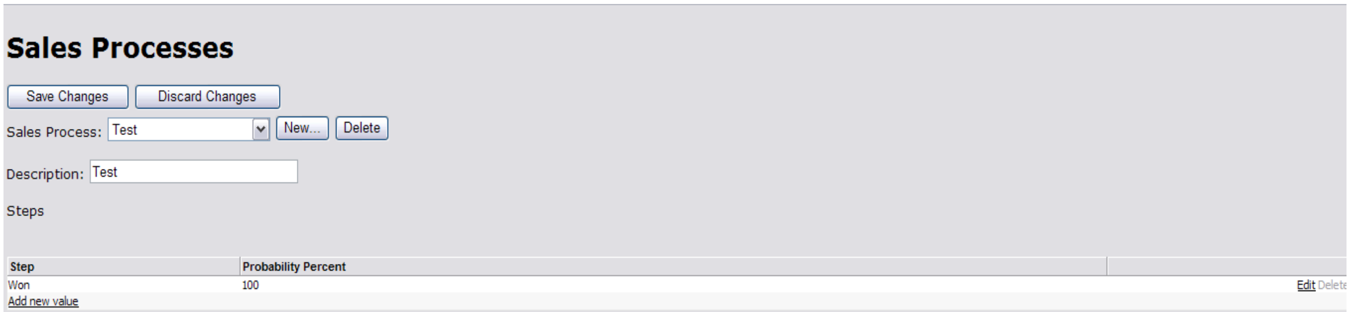
SMP Administrators have the ability to create custom toolbar buttons to add to their company's SMP application. For example, the Admin can add a toolbar button in SMP that takes the user directly to their company's home page.

The Custom Toolbar Buttons include the following information:

- Button Name
  - The name of the custom toolbar button displayed in the SMP application
- Tooltip
  - The alt tag for the custom toolbar button
- Type (i.e. Launch Web Browser)
- URL
- SMP Admin Only
  - By checking this box, only SMP Administrators (with *SMP Admin* permissions) will be able to view and access the custom toolbar button

Sales Processes

SMP Administrators can add and manage one or more sales processes, each with its own set of sale stage steps, which are displayed and usable in the Opportunity Add/Edit subject area.



There are two sales processes pre-loaded in Sales Management Plus – these are Default and SMP Standard Process. These two pre-loaded processes and their related stages (or steps) cannot be edited. By default, all Opportunitys in SMP will have “Default” selected as the Sales Process and “none” as the sales stage.

To add a new sales process, click New. This will refresh the window, allowing the administrator to name the process in the Description box, and then use the edit keys on the far right to edit/delete or add new key at the bottom left to add new steps. Administrators also have the option to add a probability percent to each step – indicating the likelihood of winning the Opportunity/opportunity. The percentage established for each step will cause an additional automatic “adjusted probable” dollar amount calculation to occur in Sales Management Plus on the Opportunity when a step is selected. If you do not want additional automatic calculation to occur, set all Step values to 100%.

To edit an existing process, select it from the dropdown Sales Process list, and then you may edit the description, add/edit steps, or delete the process completely.

Once the sales process and stages add/edit is complete, save changes and alert your team to the new options available in Opportunity Add/Edit.

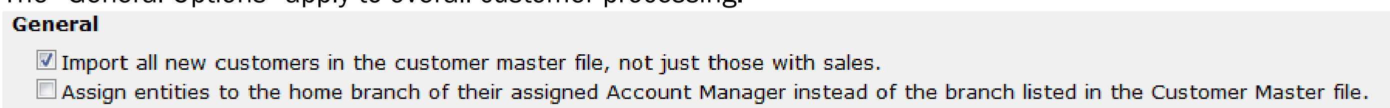
Batch Processing Options

SMP Administrators can manage their company's data batch processing options via the Batch Processing tab.

NOTE: Admins should always proceed with caution when editing batching processing options, as the changes can have major impacts to customer, contact and sales data within the database. Admins should consult with their company's SMP Account Manager before making any changes, if the outcomes of such changes are unclear.

General Options

The "General Options" apply to overall customer processing.

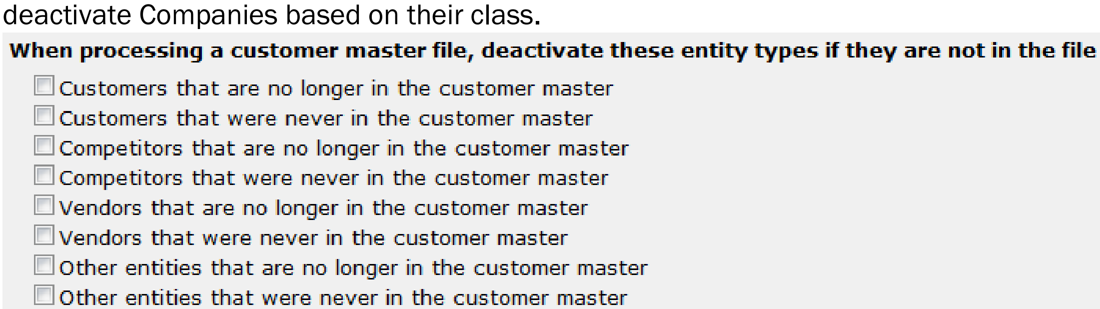


Check the checkbox to import ALL Companies in the customer file if the company wants to bring in all customer records, as exported from the business system; leave unchecked if the company only wants to bring in Companies with sales.

Check the checkbox for assigning entities to the home branch if the company does not regularly manage the customer home location assignment, or if no such assignment exists in the business system. Leave unchecked if the company manages the customer home location within the business system.

Customer Master Processing Options

There are two sections related to Customer Master processing. The first section covers when to deactivate Companies based on their class.



> **NOTE:** Choosing to deactivate Companies, Competitors or Others that were "never in the customer master" will result in the deactivation of any records manually added and maintained within SMP – such as prospects. Please proceed carefully.

The second section covers processing options by field in the Customer Master – as it relates to Companies that already exist in the database AND are included in the Customer Master file.

Update existing entities with these fields from the customer master file

- [x] Customer Name
- [ ] Div/Ref Name
- [x] Address
- [x] Phone & Fax
- [x] Store/Branch
- [x] Account Manager
- [x] SIC Code
- [ ] DUNS Number
- [x] General Class
- [x] Credit Limit
- [x] Avg Days Out
- [x] Number of Employees
- [x] Active

Update existing entities with these profile fields from the customer master file

- [x] Customer, General Field 1 - Cust Type
- [x] Customer, General Field 2 - Industry Type
- [x] Customer, General Field 3 - Program
- [x] Customer, General Field 4 - Inside Sales
- [x] Customer, Info & Notes Tab Field 5 - Warehouse Space
- [x] Customer, Info & Notes Tab Field 6 - Call Frequency
- [x] Customer, Info & Notes Tab Field 7 - Call Day
- [x] Customer, Info & Notes Tab Field 8 - Delivery Location
- [x] Customer, Info & Notes Tab Field 9 - Web Invoice
- [x] Customer, Info & Notes Tab Field 10 - Credit Hold
- [x] Customer, Info & Notes Tab Field 11 - Expect Payment
- [x] Customer, Info & Notes Tab Field 12 - Payment Type
- [x] Customer, Info & Notes Tab Field 13 - test (not shown)
- [x] Customer, Info & Notes Tab Field 14 - (not shown)
- [x] Customer, Info & Notes Tab Field 15 - (not shown)

If the checkbox is checked, the field will be updated from the Customer Master AND this field will be marked as “read-only” within SMP to ensure users do not override data that should come directly and only from the business system.

> **NOTE:** Profile fields will vary by name, based on the name given via the Profile Field management section in Web Admin.
>
> **NOTE:** Proceed with caution when changing field update options, as checking a previously un-checked field will cause data in that field to be updated upon process of the next Customer Master. This can result in significant data loss if the field should NOT be updated from the business system data.

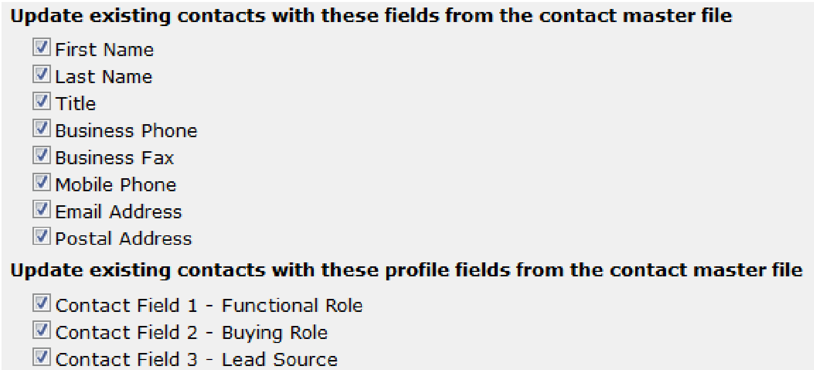
Contact Master Processing Options

Like the Customer Master Processing Options, there are two sections related to Contact Master processing. The first section covers deactivation/reactivation of contacts.

When processing a contact master file,

- [ ] Deactivate contacts that are no longer in the contact master
- [x] Reactivate contacts that were deactivated in SMP but are still in the contact masters

The second covers processing options by field for the Contact Master – as it relates to contacts that already exist in the database AND are included in the Contact Master file.



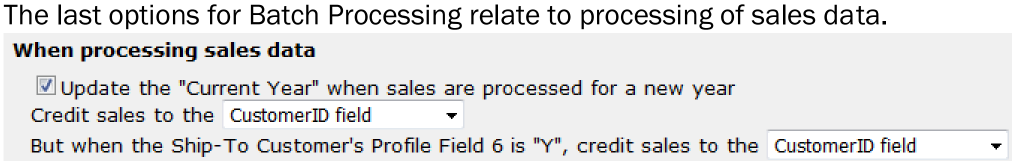
If the checkbox is checked, the field will be updated from the Contact Master AND this field will be marked as "read-only" within SMP to ensure users do not override data that should come directly and only from the business system.

> **NOTE:** Profile fields will vary by name, based on the name given via the Profile Field management section in Web Admin.

> **NOTE:** Proceed with caution when changing field update options, as checking a previously un-checked field will cause data in that field to be updated upon process of the next Contact Master. This can result in significant data loss if the field should NOT be updated from the business system data.

Sales Data Processing Options

The last options for Batch Processing relate to processing of sales data.



The 'update the "Current Year" when sales are processed for a new year' should remain checked unless your company is approaching the end of its fiscal/calendar year. The admin can choose to suspend sales data processing by unchecking this checkbox if the company does end-of-year reporting out of SMP, or needs to continue to see sales for the last year as you round out Goal Setting for the coming year. In these instances only. When end-of-year and/or Goal Setting is completed, the admin should re-check the box to trigger SMP to again begin processing in sales data.

> **NOTE:** SMP Support will send out an annual notice reminding all admins of this option approx. Mid-December each year; however, it is the responsibility of the admin to handle the checking/unchecking of this option when sales suspension/resumption is needed. SMP recommends that admins place a reminder on their calendar to ensure they remember to re-activate sales processing a couple weeks into the new calendar year.

Options for Sales Credit allow admins to choose how sales should be credited within SMP – to the Customer ID, Bill To ID, or Ship To ID. ***These options should be the same unless you have discussed sales credit exceptions directly with your SMP Account Manager.***