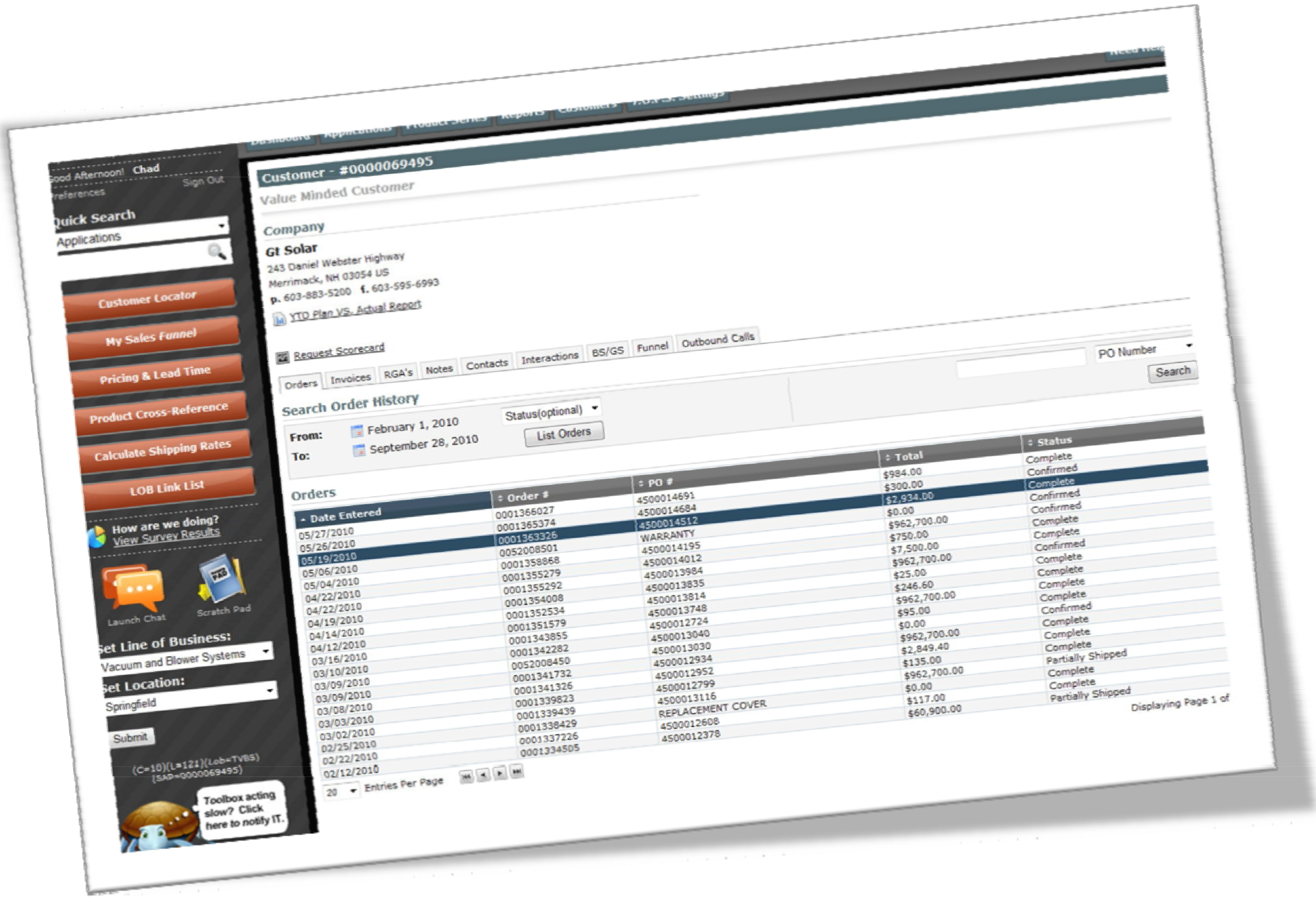


Toolbox Handbook

Standard Work Instructions for Using the Toolbox @ http://toolbox.tuthill.com.

Last Modified September 30th, 2010

Table of Contents

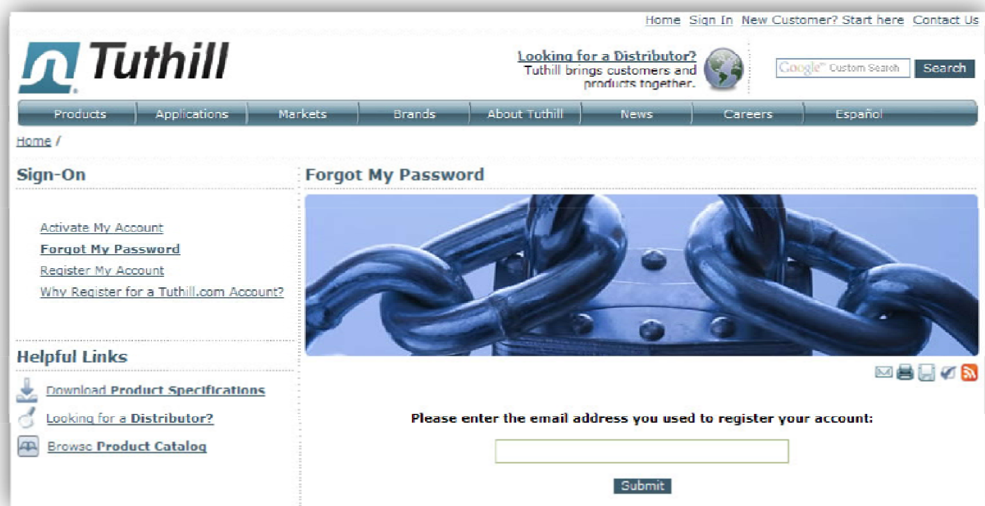
User Login and Forgot Password 4
Managing Toolbox Users 5
  Toolbox Security Groups 5
Preferences 6
The User Interface 7
  Top Navigation Panel 7
  Left Navigation Panel 8
Dashboard Overview 9
Customer Locator 11
Customer Tabs – Orders 13
Customer Tabs – Invoices 15
Customer Tabs – RGAs 16
Customer Tabs – Notes 17
Customer Tabs - Contacts 18
  Adding a Contact 18
  Deleting a Contact 20
  Editing a Contact 21
  Viewing a Contact 22
Customer Tabs – Interactions 23
  Adding an Interaction 24
  Editing an Interaction 25
Customer Tabs - Feedback 26
  Adding Feedback 27
Customer Tabs - Blue Sheets & Green Sheets 28
  Viewing Blue Sheets & Green Sheets 28
  Attaching Blue Sheets & Green Sheets to a Customer 28
  Deleting a Blue Sheet or Green Sheet 29
Customer Tabs - Funnel (Formerly SSI's) 30
  Adding a Funnel Item 30
  Editing Funnel Item 30
  Deleting a Funnel Item 30
  Exporting the Sales Funnel to Excel 31
Customer Tabs - Outbound Calls 32
  Adding an Outbound Call 32
  Viewing/Completing Outbound Calls 34
  Editing Outbound Calls 36
  Deleting Outbound Calls 36
  Outbound Calls on the Dashboard 36
Customer Tabs – T.O.P.S. Settings 37
Pricing & Lead Time 39
Calculate Shipping Rates 41
Chat (Web-based Operator Console) 42
Chat (Windows-Based Operator Console) 44
  Profile Manager 44
  Working with Profiles 45
  General 47
  Login 50

Connection 51
Events 53
Spelling 55
Operators 58
Visitors 59
Geo Location 60
Co-Browser 62
Regional 64
Scratch Pad 65
Quick Search 66
Product Series 68
Viewing and Associating Materials 68
Editing Product Series Data 69
Deleting a Product Series 69
Applications 70
Adding an Application 70
Editing an Application 70
Deleting an Application 72
Reports – Feedback 73
Viewing Individual Feedback Items 73
Filtering and Exporting Feedback for the Lake Room 74
Reports – Outbound Calls 76
Reports – T.O.P.S. Users 77
Linking Multiple SAP Accounts to a Single Login 77
Setting the Default Account 78
Removing a Multiple Account Association 78
Updating a Nickname 78
T.O.P.S. Settings – Permissions 79
T.O.P.S. Settings – Configuration 80
Adding an Announcement 81
Editing an Announcement 81
Deleting an Announcement 82
T.O.P.S. Settings – Feedback Categories 83
Adding Categories and Sub-Categories 83
Editing Feedback Categories and Sub-Categories 83
Deleting Feedback Categories and Sub-Categories 83
T.O.P.S. Settings – Tuthill Contacts 84
Customers - Add VMC 85
Screen-Popping 86

User Login and Forgot Password

1. From the login screen click on the Enter your Tuthill E-mail address and your password. Click **OK** to login.

2. If you forgot your password, click on **Forgot your password? Click Here…**
3. Enter your e-mail address and click **Submit**.   A link to reset your password will be sent to your e-mail address.



4. When you receive the e-mail from the system, click on the link. A page will load prompting you to enter a new password.
5. Enter your new password twice and click **Submit**.

Managing Toolbox Users

Toolbox user administration is done through the secure area of Tuthill.com. Standard work has been published on myTuthill for how to access the user administration portion of Tuthill.com. Below is a sampling of the standard work to refresh your memory, but for the complete standard work search for “manage tuthill.com users” on myTuthill.

1. Visit http://www.tuthill.com
2. Login using your Tuthill.com username and password
3. Once logged in click on the **Secure Area** link at the top of the site
4. Click on the **Employees Only** link
5. Click on the **User Administration** link
6. Search for the user that you want to manage using the filter near the top
7. Assign appropriate security groups to user by clicking on the groups icon

Toolbox Security Groups

There are several groups that user administrators can assign to Toolbox users. The explanations below will clarity what each of the security groups entail.

Toolbox Admins
Toolbox Admins can do everything that plain Toolbox users can do plus they can add VMCs to T.O.P.S. and manage all items under the T.O.P.S. Settings menu. This includes setting LOB permissions, configuration, publishing announcements, managing feedback categories, and managing Tuthill contacts.

Toolbox
This group is the basic Toolbox user group. No administration can be done in this role alone. It does not include selling and credit functions.

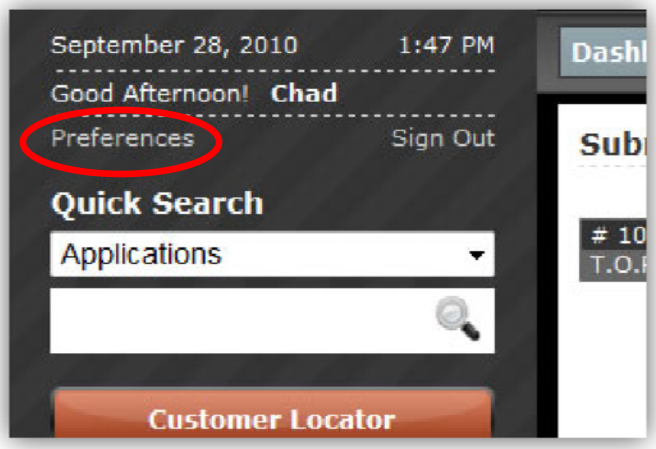
Toolbox Selling
This group is reserved for Tuthill salespeople. It includes basic Toolbox group functionality. It allows them to manage their LOB’s sales funnel. A “My Sales Funnel” button appears for these users in the left navigation panel.

Toolbox Credit
This group is reserved for individuals that manage customer credit. It includes basic Toolbox group functionality. Toolbox Credit group members can generate D&B credit scorecards and view credit history.

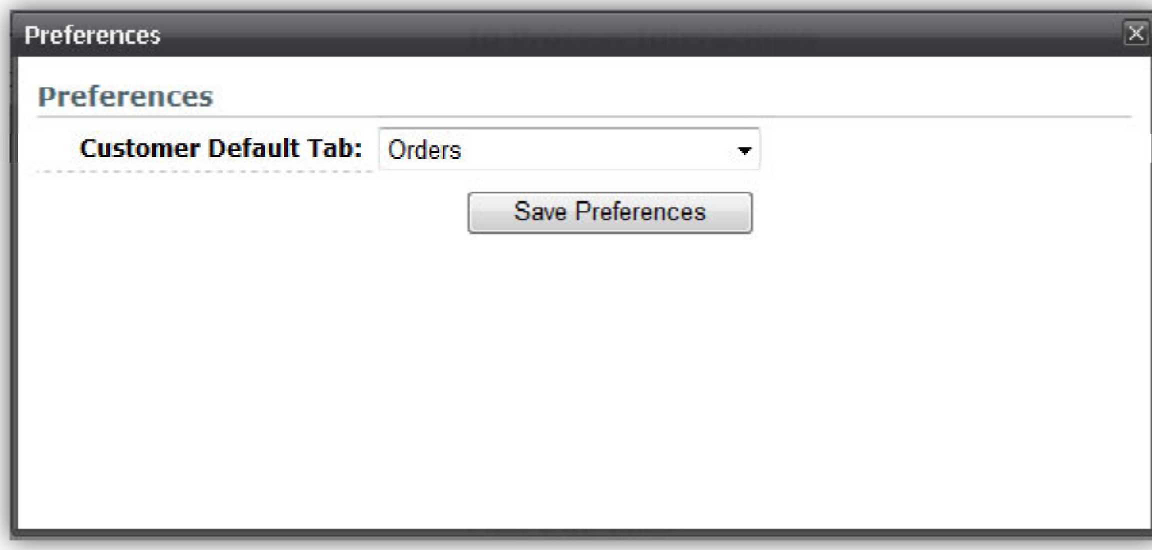
Preferences

Users can set a preference for which tab of a customer view that the customer locator will take them after a search has been executed and a result has been found.

1. Click on the **Preferences** link near the top of the left navigation panel to open the preferences window.



2. Select which tab you want the customer locator to take you to when a result is found from the **Customer Default Tab** drop-down menu.



3. Click the **Save Preferences** button to save your preference and to close the preferences window.

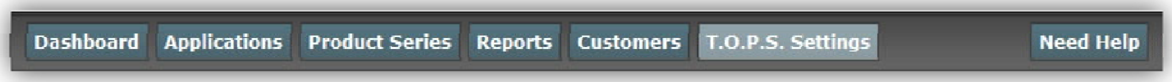
If you don't want to make changes to your Customer Default Tab after opening the preferences window, click on the "X" near the top right of the mod-window to close it.

The User Interface

The Toolbox's user interface was designed to be as intuitive as possible with input from real CSRs, salespeople, marketing folks, and credit management. The interface will undoubtedly change as we spin the CI wheel on it. In fact it already has changed since its initial release in November of 2009.

Top Navigation Panel

The top navigation of the site, pictured below, contains links to administrative and reporting tools throughout the Toolbox.

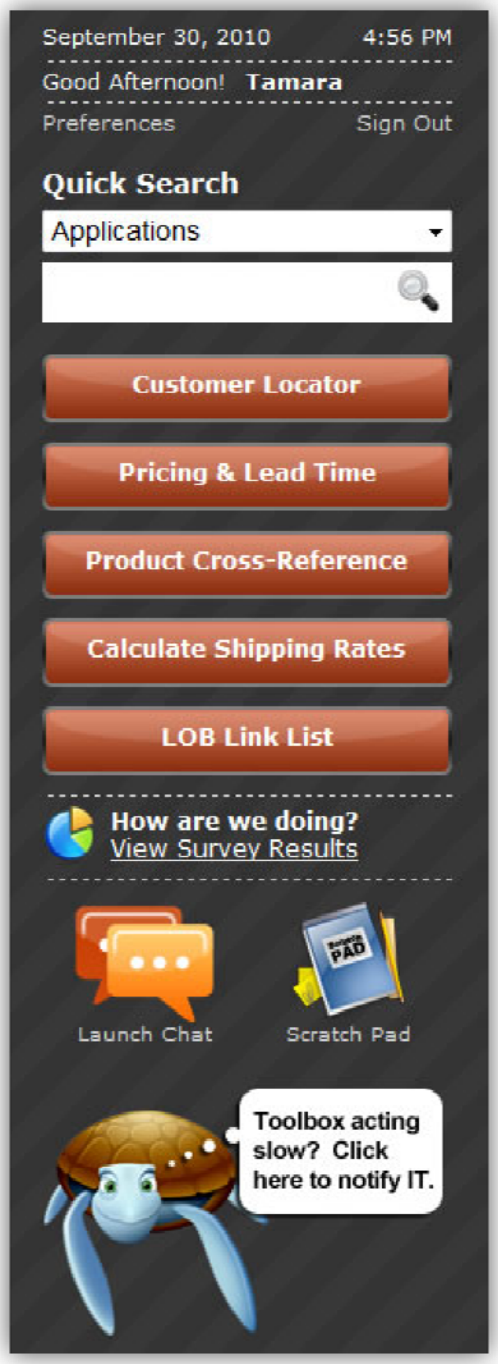


Here is a snapshot of where this menu can take you:

- **Dashboard:** Returns to the "home page" of the Toolbox, the dashboard
- **Applications:** Tools to manage applications of our products
- **Product Series:** Tools to manage product series for your LOB
- **Reports**
  - **Opportunity Matrix:** View your LOB's opportunity matrix
  - **Outbound Calls:** Consolidated view of all outbound calls
  - **Pre-Authorizations:** Displays a list of credit authorizations run by the credit management team for your LOB
  - **Feedback:** A report containing all feedback (and interactions) for your LOB
  - **TOPS Users:** A list of all users that have been given access to T.O.P.S.
- **Customers**
  - **Add VMC:** This is how you grant customers access to T.O.P.S.
  - **Manage SAP Accounts:** Tools that allow you to manage existing T.O.P.S. accounts
- **T.O.P.S. Settings**
  - **Permissions:** Set permissions for what your LOB's customers can do on T.O.P.S.
  - **Configuration:** Manage various settings for T.O.P.S.
  - **Announcements:** Manage announcements that appear on the T.O.P.S. home page for your LOB
  - **Feedback Categories:** Manage your LOB's feedback categories for the lake room
  - **Tuthill Contacts:** Manage your LOB's contacts that you want to appear on T.O.P.S.
- **Need Help:** Access this very document, the Toolbox Handbook

Left Navigation Panel

The left navigation panel contains the most frequented tools of the Toolbox and even offers some shortcuts for users to perform valuable searches within our data repository.



Date and Time

Personalized Greeting
Preferences: Set User Defaults
Sign Out: Log out of the Toolbox

Quick Search: Applications, Product Series, Interaction Number, Track Shipment (by PO#), Invoice by Delivery #, Order Search (by PO#)

Customer Locator: Locate customers

Pricing & Lead Time: Lookup pricing and lead time

Product Cross-Reference: Lookup customer, competitor, and obsolete parts

Calculate Shipping Rates: Lookup live shipping rates from Tranzact

LOB Link List: Shortcuts for you LOB

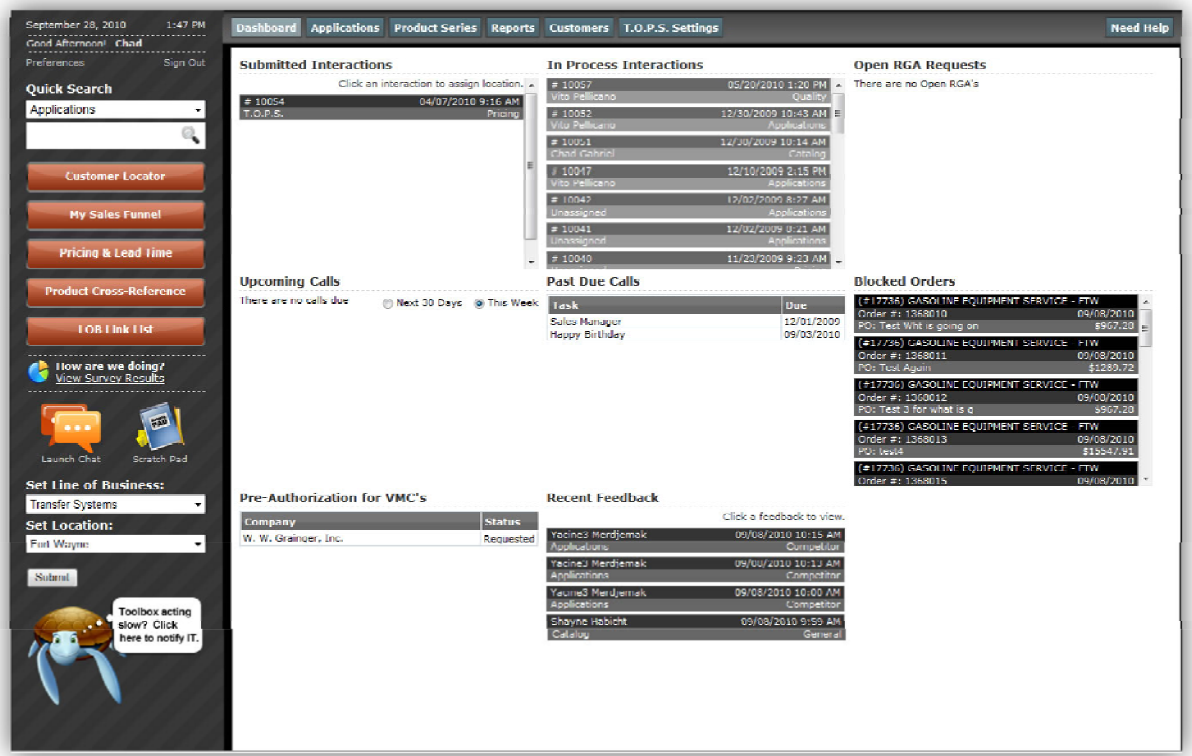
How are we doing? View Survey Results from T.O.P.S.

Launch Chat: Web-based chat operator console.

Scratch Pad: Your individual electronic notepad.

Turtle Button: Report slow performance of the Toolbox to Corporate IT

Dashboard Overview



The dashboard is the screen that will initially load when you login to the Toolbox.

Submitted Interactions
These are new interactions that have been submitted from T.O.P.S. that require an answer to a customer. These have not yet been assigned to a location or individual.

In Process Interactions
These are interactions that are in process, but not yet closed. They have typically been assigned to a location and individual.

Open RGA requests
These are new RGA requests from T.O.P.S. users. These will need to be reviewed and confirmed by the customer service rep for the customer to receive an RGA number.

Blocked Orders
These are new orders entered via EDI or T.O.P.S. that have lines containing items that exceed their specified large order quantity.

Upcoming Calls
This list contains the outbound calls that are due to be completed in the current week (Monday through Friday) by the CSR that is logged in. Visibility of upcoming calls can be expanded to the next 30 days by selecting the appropriate radio button.

Past Due Calls
This is a list of calls that are not marked as complete and that have due dates that occur in the past. This list is specific to the individual CSR that is logged in to the toolbox.

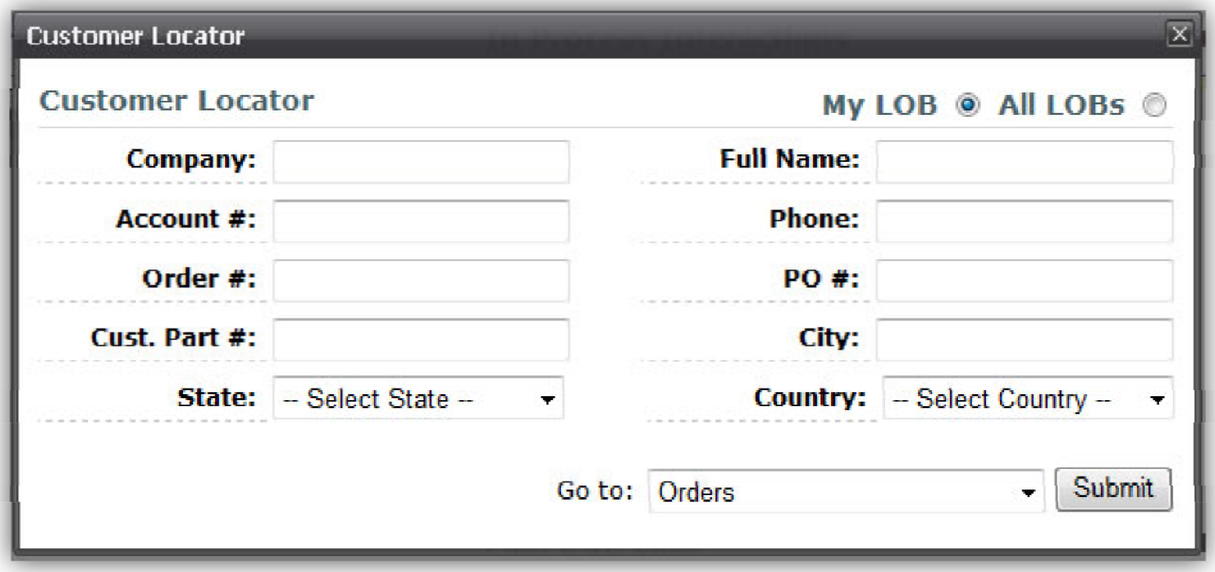
Pre-Authorization for VMC's
This list is used by Toolbox users that have access to the credit management tools. It displays credit pre-authorization requests that need to be done by the credit management team.

Recent Feedback
This list contains feedback that has been recently added to the repository by all users, including customers by way of T.O.P.S.

Customer Locator

The customer locator is a tool for locating a specific customer using various search criteria such as company name (or partial), SAP account number, order number, customer part number, contact full name, phone number, city, state, or country. Customers can be located within one LOB or all LOBs by using the “My LOB” / “All LOB” filter option. If your location is using screen-popping the customer locator will automatically populate with caller ID information in the phone field and search for based on contact Phone 1 and Mobile numbers stored in SAP.

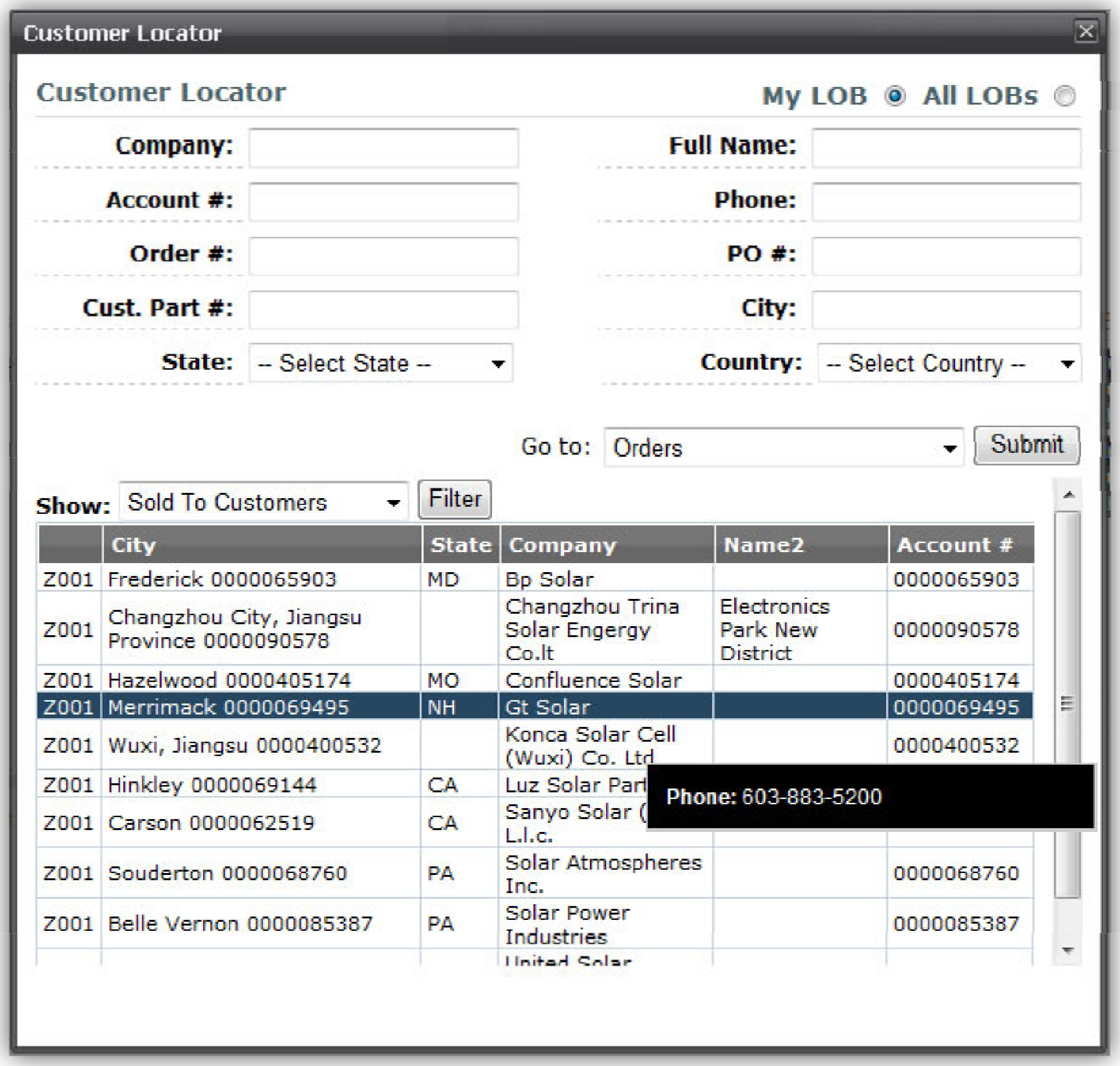
1. Click on the orange **Customer Locator** button in the left navigation panel to launch the customer locator tool



2. Enter your search criteria
3. Press your Enter key or click on **Submit**
4. If multiple results are returned click on the row containing the customer you’re attempting to locate.

You can also choose whether the results returned are from your LOB or all LOBs using the radio buttons labeled “My LOB” or “All LOBs” at the top-right side of the customer locator.

When multiple results are found, users will be presented with a list of matches to select from. These results can be filtered by customer type: All, Ship To, Sold To, Prospective. By hovering over a result users can see the primary phone number for a customer in a black tool-tip box. All of these features can be seen in the image below.

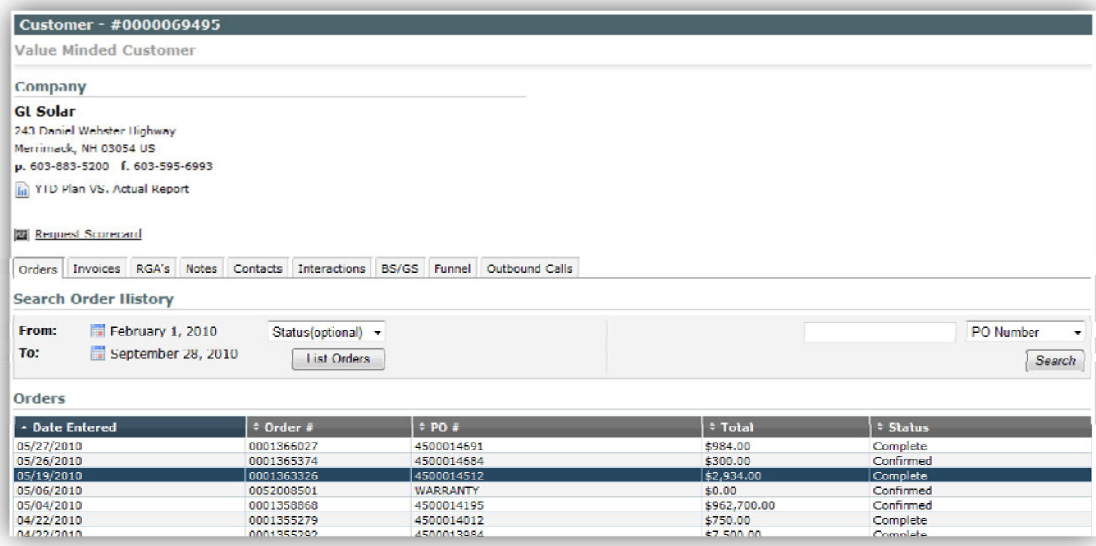


Go To
The “Go To” feature allows users to go to specific places within the portal after a customer has been located. For example, when “Orders” is selected in the Go To menu and a user clicks on the Submit button, the resultant search will load the orders tab for that specific customer. The default value for this menu can be set under preferences.

Customer Tabs – Orders

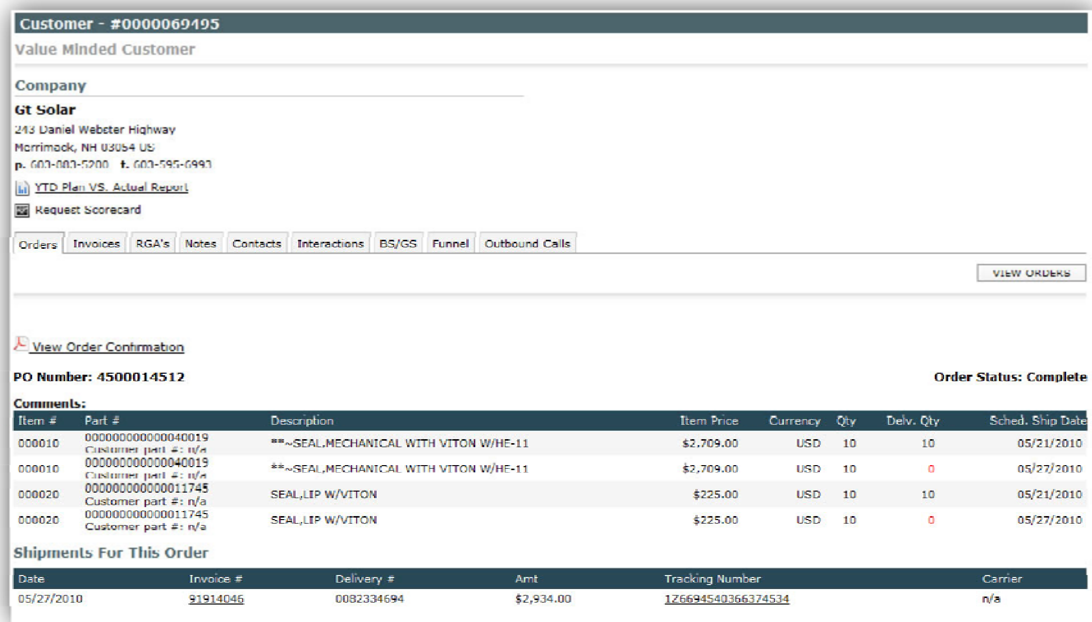
The orders tab of the customer view contains information about orders placed by a specific customer along with a filter to locate specific orders based on date range, status, PO number, delivery number, part number, or SAP order number. All columns can be sorted in ascending/descending order by clicking on the column header.

1. If you're not already viewing the **Orders** tab click on it
2. If you need to see more than a 60 day window of orders placed, specify a From and To date range along with a status and click on the **List Orders** button (or use the default order list)
3. Enter filter criteria and click on the **Search** button (or use the default orders list)



Note: The filter criteria for date ranges and status types are not linked to the search box for the orders tab in any way. In other words, if you specify a date range of 9/1/2010 through 9/30/2010 and then enter a specific PO number in the search box on the right, clicking the Search button will not incorporate the dates that you just specified. And likewise, entering a specific PO number on the right and then clicking the List Orders button on the left will not search for the value entered on the right, but will list orders within the specified date range and status.

4. Click on any row to view order details



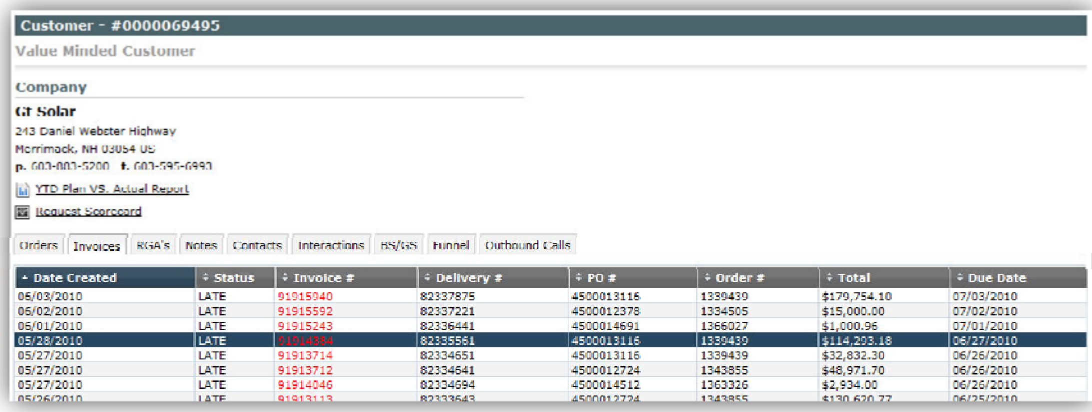
On the “Order Details” page you can see the PO number, line numbers, part numbers, descriptions, item price, currency, quantity ordered, quantity delivered (red if delivery for line isn’t complete), and scheduled ship date. Shipment information for the order is also available and includes the invoice date, invoice number, delivery number, invoice amount, tracking number, and carrier for shipments already made.

5. Click on the **View Order Confirmation** link to view the actual SAP output captured as a PDF document
6. Click on a tracking number to view available tracking information
7. Click on an invoice number to view the details of an invoice
8. Click on the **View Orders** button to return to the initial list of orders on the orders tab

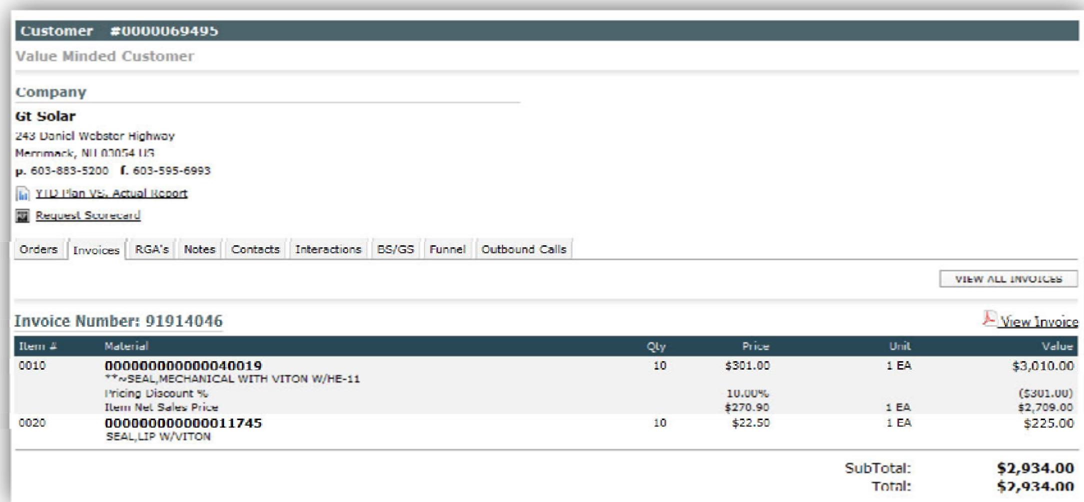
Customer Tabs – Invoices

The invoices tab of the customer view contains information such as the date created, status, invoice number, delivery number, PO number, SAP order number, total, and due date on invoices for a specific customer. Red/Green/Black color coding is also present to identify which invoices are late, on-time, or paid according to that customer's terms. All columns can be sorted in ascending/descending order by clicking on the column header.

1. Click on the **Invoices** tab within the customer view
2. Click on any row to view invoice details.



On the "Invoice Details" page can see the invoice number, line numbers, material names, descriptions, discounts, unit, quantity, list price, net price, sub-total, and total.

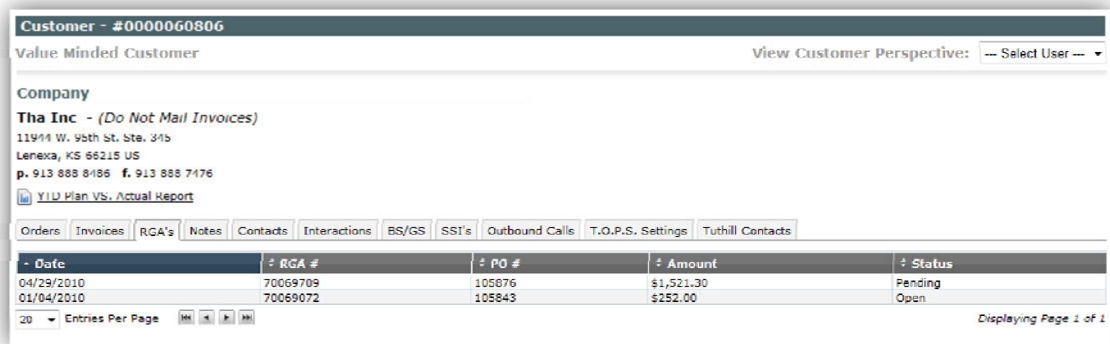


3. Click on the **View Invoice** link to view the actual SAP invoice output in PDF format
4. Click on the **View All Invoices** button to return to the default list of invoices on the invoices tab.

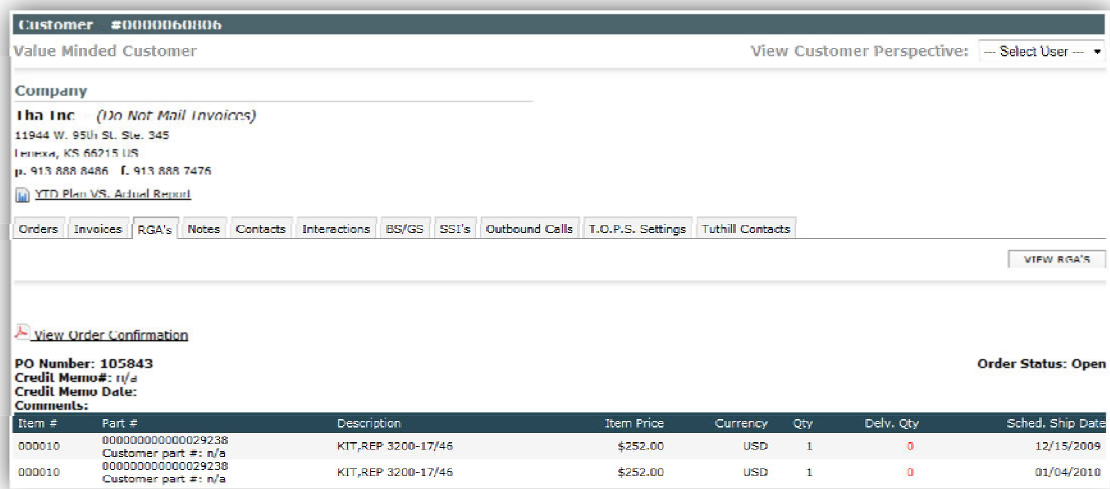
Customer Tabs – RGAs

The RGAs tab of the customer view contains a list of RGA information such as the date, RGA number, PO number, amount, and status. All columns can be sorted in ascending/descending order by clicking on the column header.

1. Click on the **RGA's** tab within the customer view



2. Click on any row to view the details of an RGA.



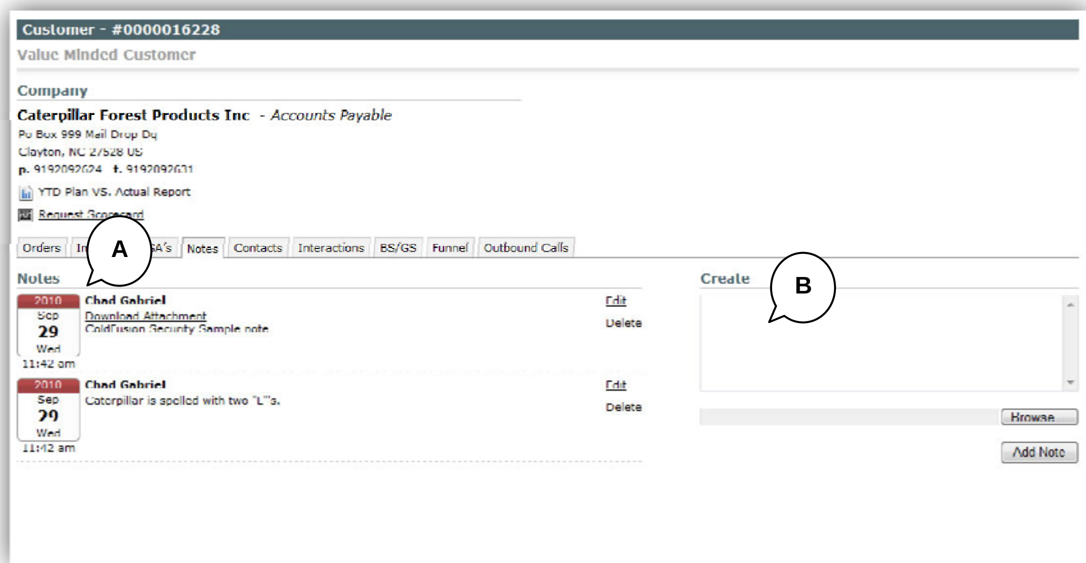
On the "RGA Detail" page can see the line number (item number), part number, description, item price, currency, quantity, quantity delivered and scheduled ship date. The header information also contains the PO number, Credit Memo #, Credit Memo Date, status, and the reason for the return (comments).

3. Click on the **View Order Confirmation** link to view the official SAP output for this RGA in PDF format.
4. Click on the **View RGA's** button to return to the default list of RGAs on the RGA's tab.

Customer Tabs – Notes

The Notes tab of the customer view contains chronological notes on a customer entered by any Toolbox users (CSRs, salespeople, credit management).

1. Click the tab labeled **Notes** on the customer view to see or add any notes to a customer.



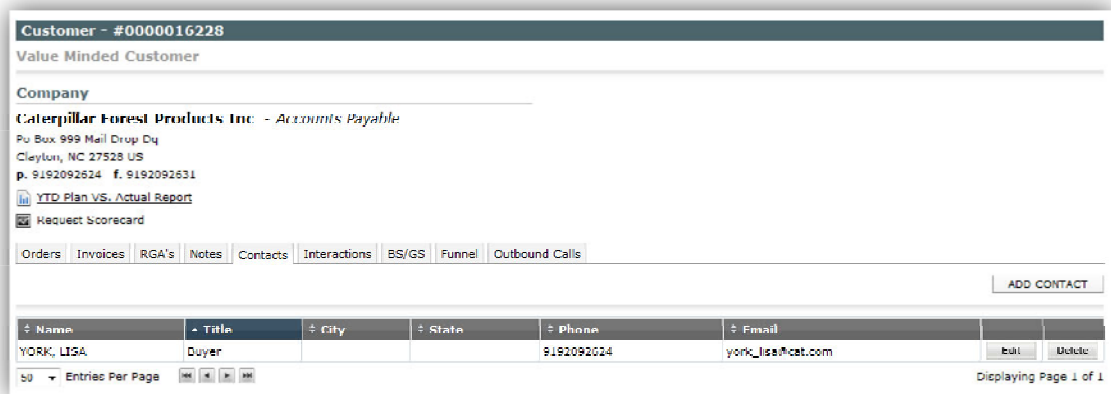
You will see who and when any notes were entered on the left (A).

2. To add a note on a customer, simply enter the information you want on a note in the text box (B) labeled Create.
3. If you'd like to add an attachment to the note click on the **Browse…** button and choose a file from your computer
4. Click the **Add Note** button.

Customer Tabs - Contacts

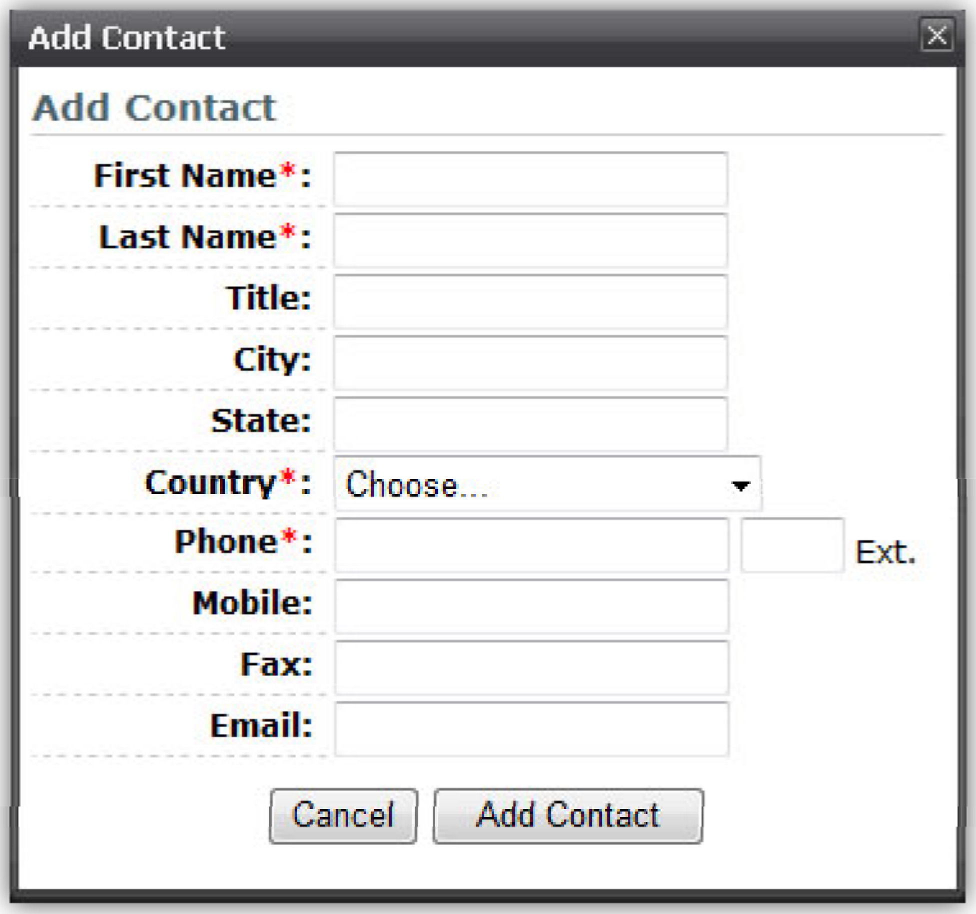
The Contacts tab of the customer view contains a list of contact information such as name, title, phone, and e-mail. All columns can be sorted in ascending/descending order by clicking on the column header. The navigation buttons at the bottom of the screen will allow you to set how many items are visible per page, go to the next page, previous page, last page, and first page. The information located at the bottom-right tells you how many pages of results there are and which page you are on.

1. Click the tab labeled **Contacts** on the customer view to see and manage customer contacts.



Adding a Contact

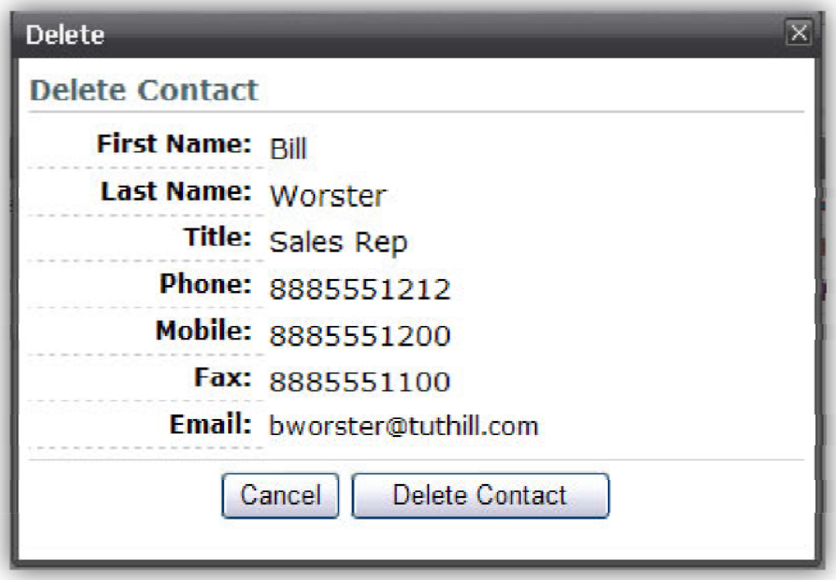
1. Click on the **Add Contact** button to add a new contact for this customer. This will bring up the screen below for you to add your contact.



2. Press **Cancel** if you don't wish to add the contact.
3. Populate your available contact information. Fields marked with the red asterisk (*) are required.
4. Press **Add Contact** to add the contact to the customer once you have entered the required fields.

Deleting a Contact

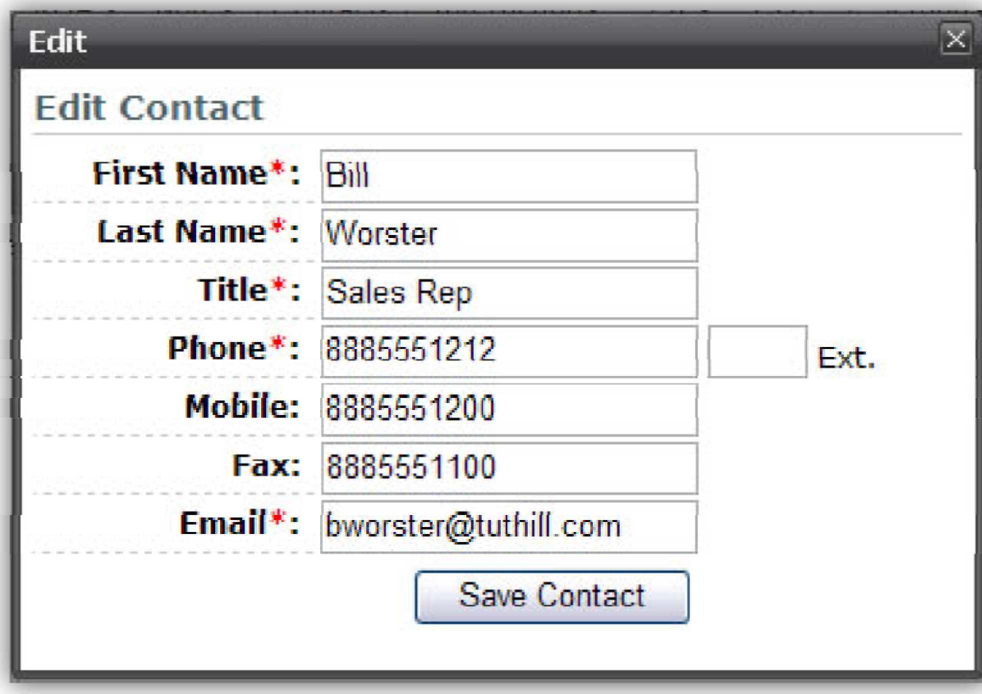
1. To delete a contact, simply click the **Delete** button as pictured above. Clicking this button will bring up the screen below.



2. If you change your mind and don't want to delete this contact, click **Cancel**.
3. If you want to continue with deleting this customer, click the **Delete Contact** button.

Editing a Contact

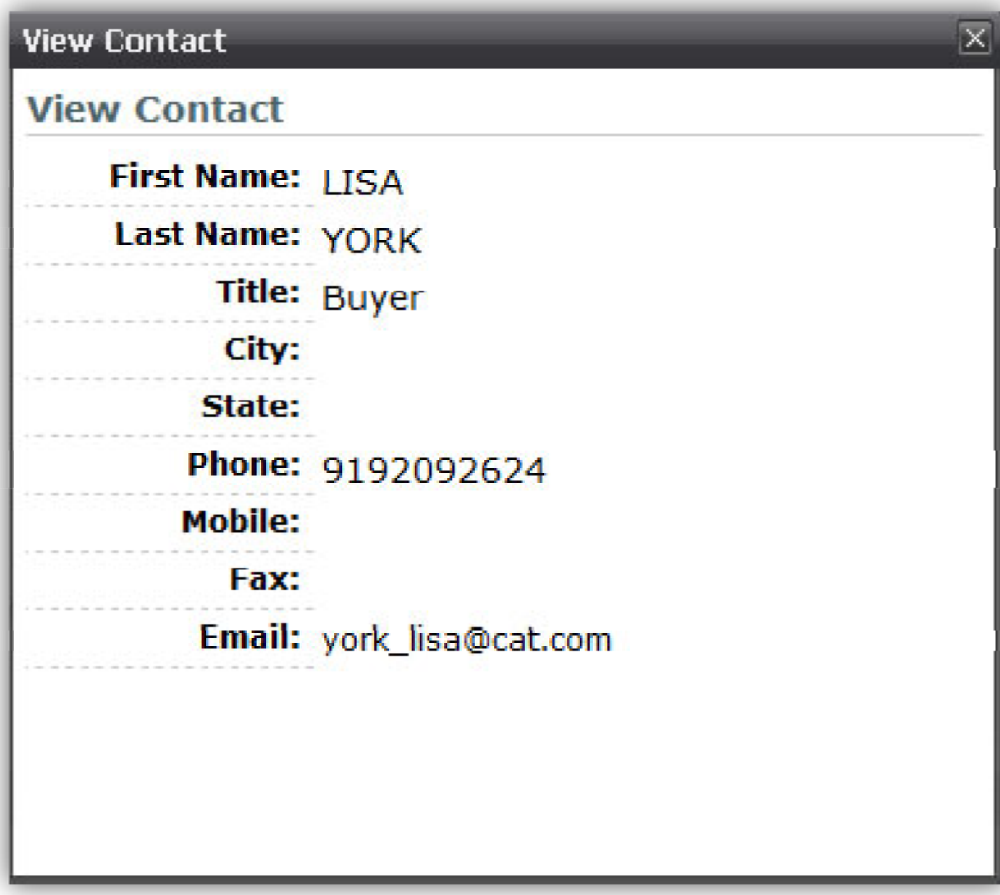
1. To edit the information on a contact, click the **Edit** button in that contact's row as pictured above. This will bring up the screen below.



2. Change any of the information that you wish to change and click the **Save Contact** button. Please note that items with the red asterisk (*) beside them are required.

Viewing a Contact

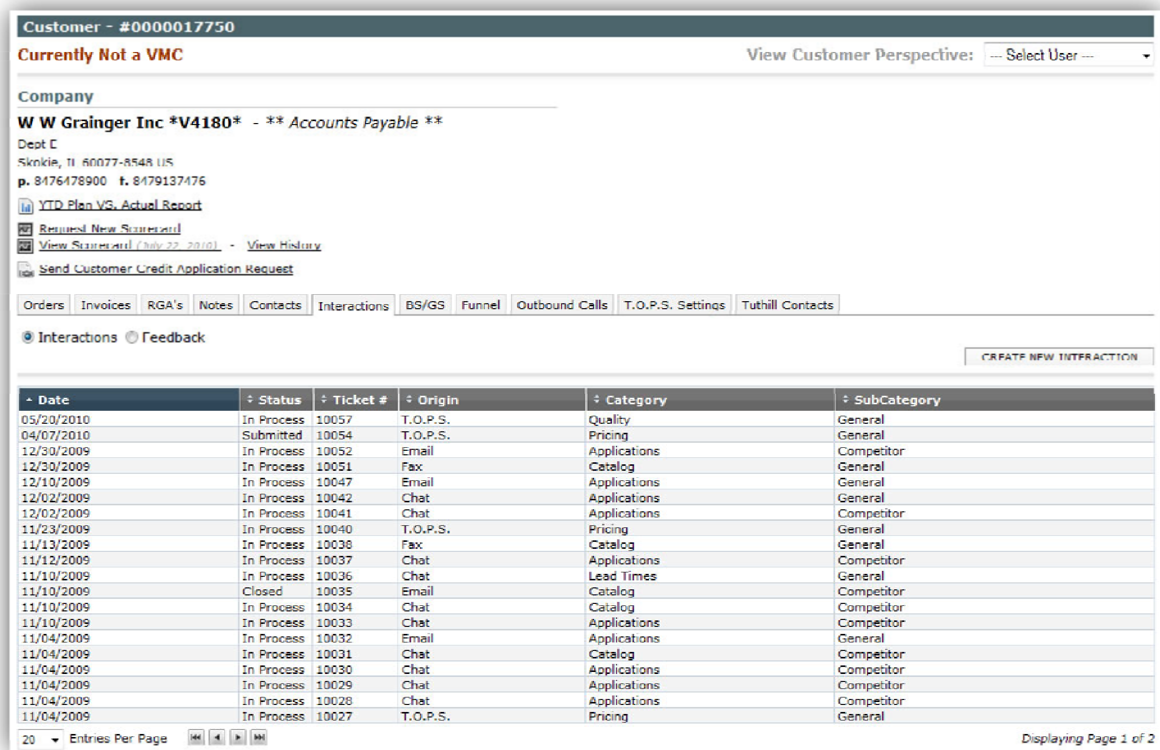
1. To view all the information on a contact, simply click anywhere on the row of the contact. Clicking on a contact will bring up the screen below.



2. Once you have finished viewing the contact data, click the **X** in the upper right hand corner to close the View Contact box.

Customer Tabs – Interactions

The Interactions tab of the customer view contains information on Interactions such as date, status, ticket number, origin, category, and sub-category. All columns can be sorted in ascending/descending order by clicking on the column header. The navigation buttons at the bottom of the screen will allow you to set how many items are visible per page, go to the next page, previous page, last page, and first page. The information located at the bottom-right tells you how many pages of results there are and which page you are on.



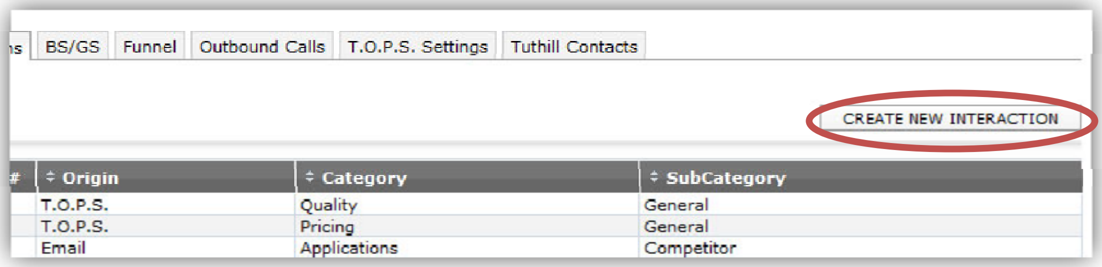
Date	Status	Ticket #	Origin	Category	SubCategory
05/20/2010	In Process	10057	T.O.P.S.	Quality	General
04/07/2010	Submitted	10054	T.O.P.S.	Pricing	General
12/30/2009	In Process	10052	Email	Applications	Competitor
12/30/2009	In Process	10051	Fax	Catalog	General
12/10/2009	In Process	10047	Email	Applications	General
12/02/2009	In Process	10042	Chat	Applications	General
12/02/2009	In Process	10041	Chat	Applications	Competitor
11/23/2009	In Process	10040	T.O.P.S.	Pricing	General
11/13/2009	In Process	10038	Fax	Catalog	General
11/12/2009	In Process	10037	Chat	Applications	Competitor
11/10/2009	In Process	10036	Chat	Lead Times	General
11/10/2009	Closed	10035	Email	Catalog	Competitor
11/10/2009	In Process	10034	Chat	Catalog	Competitor
11/10/2009	In Process	10033	Chat	Applications	Competitor
11/04/2009	In Process	10032	Email	Applications	General
11/04/2009	In Process	10031	Chat	Catalog	Competitor
11/04/2009	In Process	10030	Chat	Applications	Competitor
11/04/2009	In Process	10029	Chat	Applications	Competitor
11/04/2009	In Process	10028	Chat	Applications	Competitor
11/04/2009	In Process	10027	T.O.P.S.	Pricing	General

20 Entries Per Page   Displaying Page 1 of 2

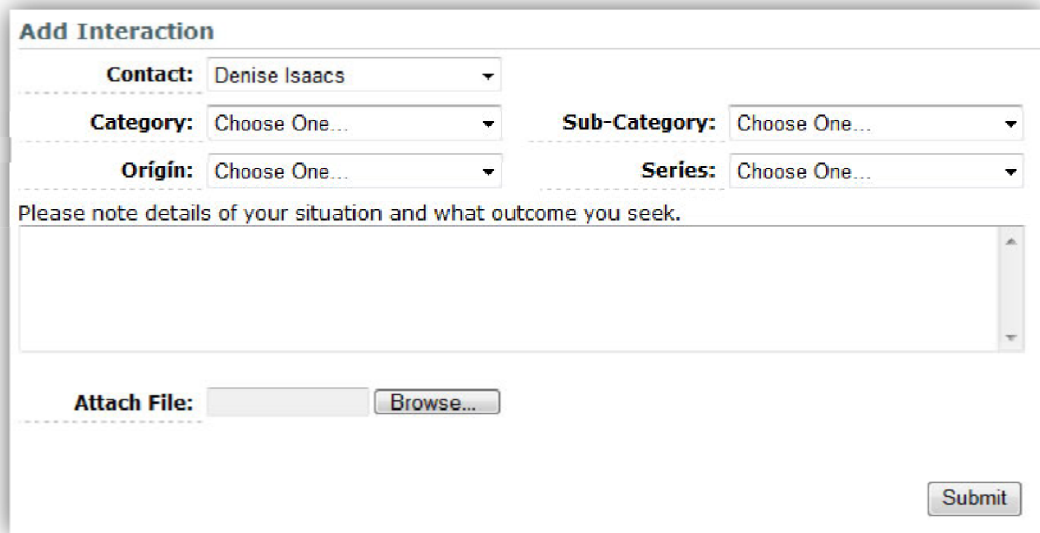
Note: Both Interactions and Feedback are both managed within the Interactions tab and show up within the feedback reports for the lake room. The difference between interactions and feedback is that an interaction signifies that we owe a customer a response, feedback does not.

The contact information located on the top-right of this page will only show up if this screen is accessed through a screen-pop as displayed below.

Adding an Interaction



1. Select the **Interactions** radio button if it's not already selected
2. Click the **CREATE NEW INTERACTION** button. The screen below will open.



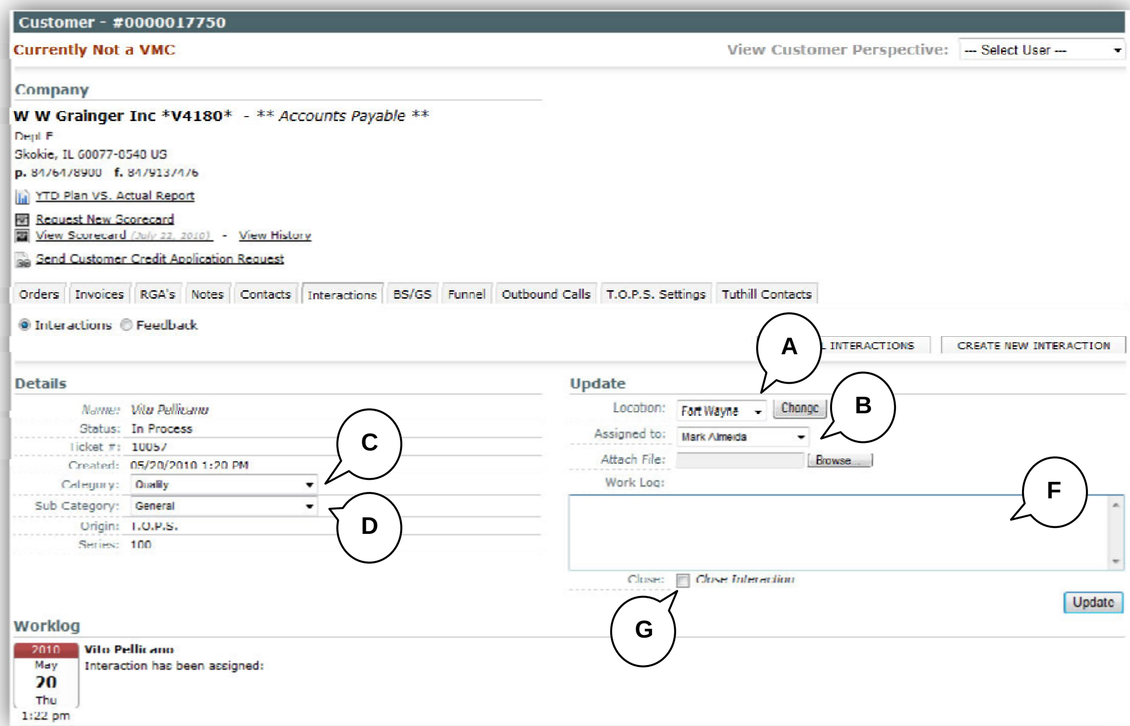
3. Select the Contact, Category, Sub-Category, Origin, and Series from their respective drop down menus.

   Note: Contacts must be entered as a contact under the contact tab on the customer before it shows up as a selection on the contact drop down.

4. Enter an explanation of the interaction in the large text box and be sure to capture any deliverables due and golden nuggets
5. If you want to attach a file click on the **Browse…** button and choose a file from your computer
6. Click the **Submit** button to save this interaction
7. Give the customer the newly generated ticket number for future reference.

Editing an Interaction

1. To edit an interaction, simply click on the row containing the interaction.
2. Verify that the correct **location** (A) is chosen. Correct if necessary.
3. Assign a specific Tuthill Contact from the **Assigned to** list (B) to this Interaction



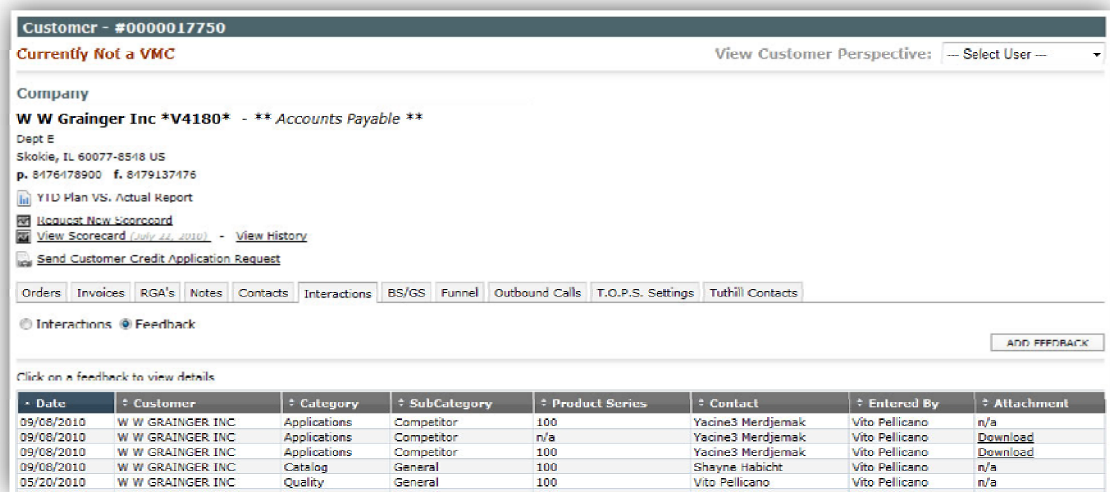
4. Verify the **Category** (C) and **Sub-Category** (D) fields. Correct if necessary.

You will see all Work log entries that have been entered for this Interaction at the bottom of the page.

5. To add to the work log, enter any new information to the work log text box (F)
6. If this Interaction has been resolved and this is the last work log entry for it, you can close the interaction by checking the **Close Interaction** box (G).
7. Click the **Update** button to save your changes and to send an e-mail notification to the customer

Customer Tabs - Feedback

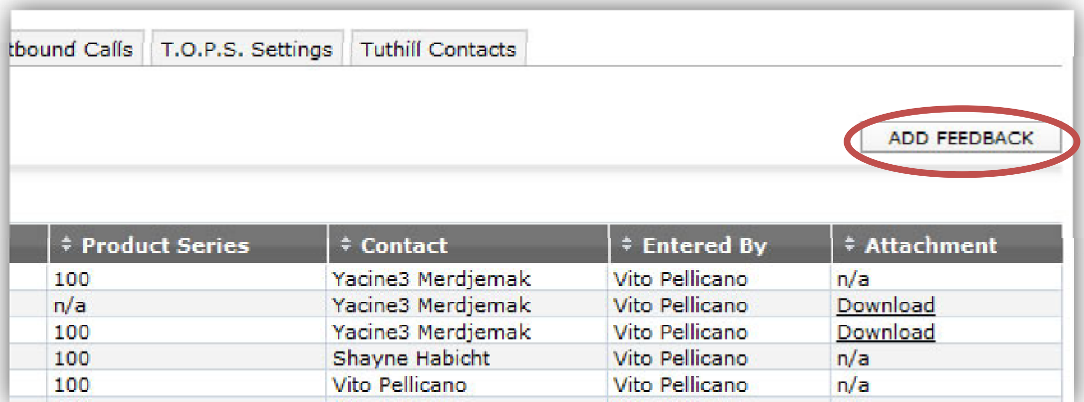
The Interactions tab of the customer view also contains information on feedback such as date, individual, category, sub-category, and product series. All columns can be sorted in ascending/descending order by clicking on the column header. The navigation buttons at the bottom of the screen will allow you to set how many items are visible per page, go to the next page, previous page, last page, and first page. The information located at the bottom-right tells you how many pages of results there are and which page you are on.



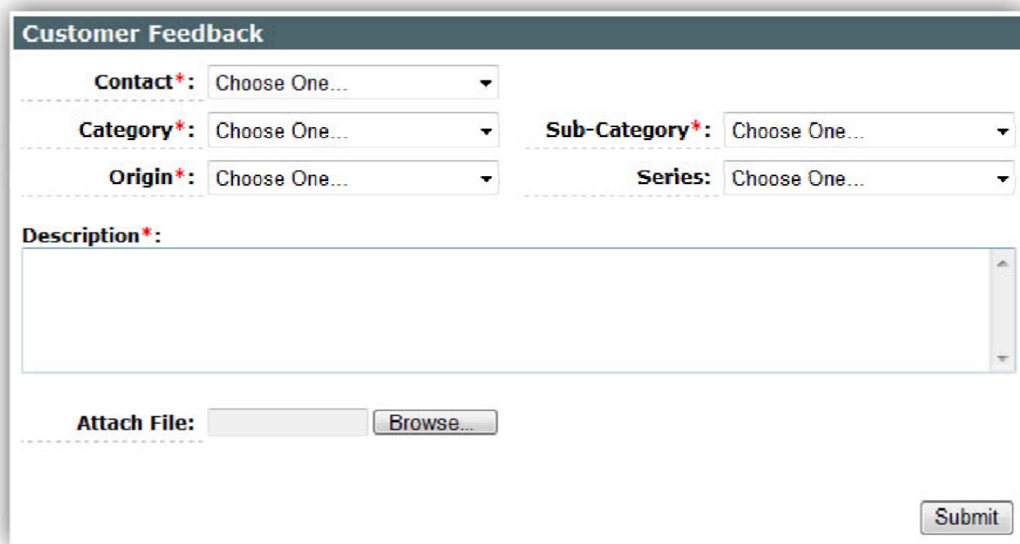
1. Select the **Feedback** radio button to view feedback within the Interactions tab
2. Click on the row containing the feedback you wish to view. You will see the category and sub-category of the feedback along with the data entered. At the bottom you'll see the origin and date of the feedback

3. Verify the category and sub-category. Correct if necessary and click **Save**.
4. Click the **X** in the top right corner to close this window.

Adding Feedback



1. Select the **Feedback** radio button if it's not already selected
2. Click the **ADD FEEDBACK** button. The screen below will pop up.

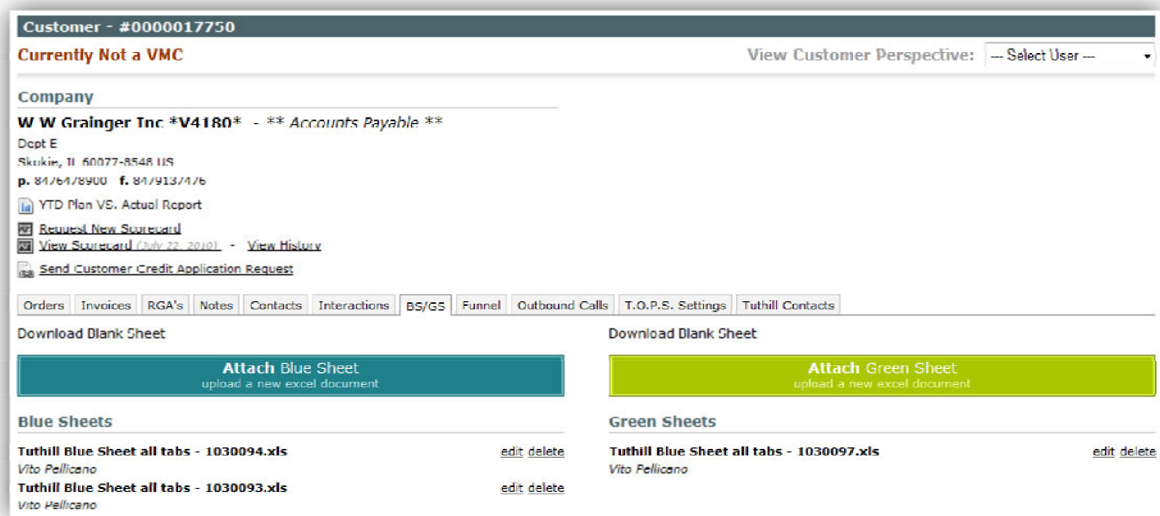


3. Select a Contact (must be a contact under the contact tab for the customer), Category, Sub-Category, Origin, and Series from their respective drop down menus. Note that any field with a red asterisk (*) beside it is a required field.
4. Enter the feedback from the customer in the text box labeled Description
5. Click the **Submit** button to save your changes

Customer Tabs - Blue Sheets & Green Sheets

In support of the TBS Selling process Blue Sheets (BS) and Green Sheets (GS) may be attached to a customer within the Toolbox. These sheets are visible to all Toolbox users.

Blank Blue Sheet and Green Sheet templates are available at the top of this tab for your convenience. To access these templates simply click on the **Download Blank Sheet** link.



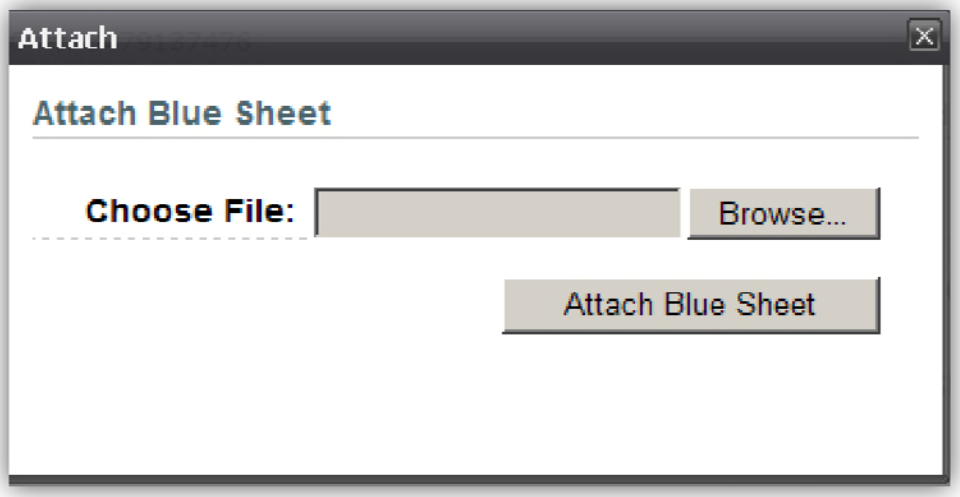
Viewing Blue Sheets & Green Sheets

1. Click on the **BS/GS** tab to view any available Blue Sheets/Green Sheets associated with a given customer
2. Click on the bold sheet name to open it

Attaching Blue Sheets & Green Sheets to a Customer

1. Click on one of the two big buttons that say **Attach Blue Sheet** or **Attach Green Sheet** depending on what type of file you'd like to attach.
2. Browse to file you'd like to upload on your local computer or network drive.

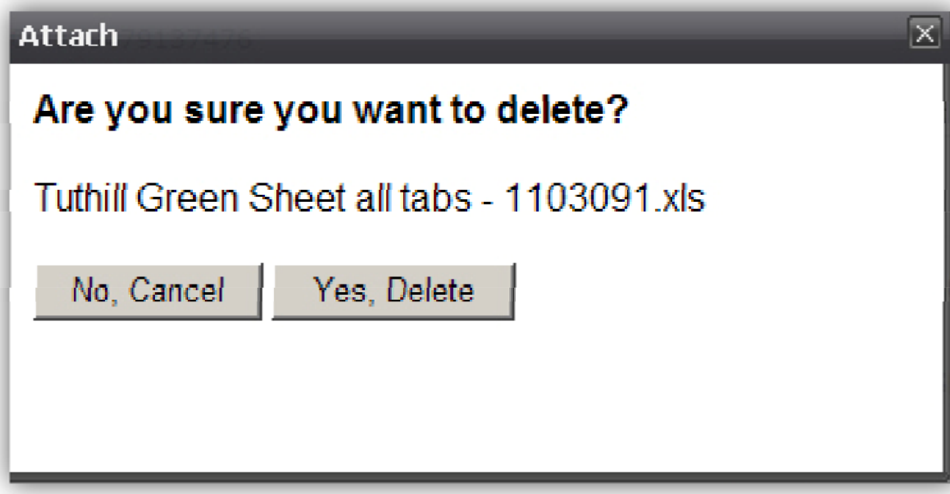
3. After selecting the file you'd like to upload, click **Attach Blue Sheet** or **Attach Green Sheet** to upload it



Note: When updating Blue Sheets and Green Sheets you'll need to open the file and save it locally. After making your changes save it again and then return to the view page of the SSI. Click on the "edit" link and re-upload your updated file.

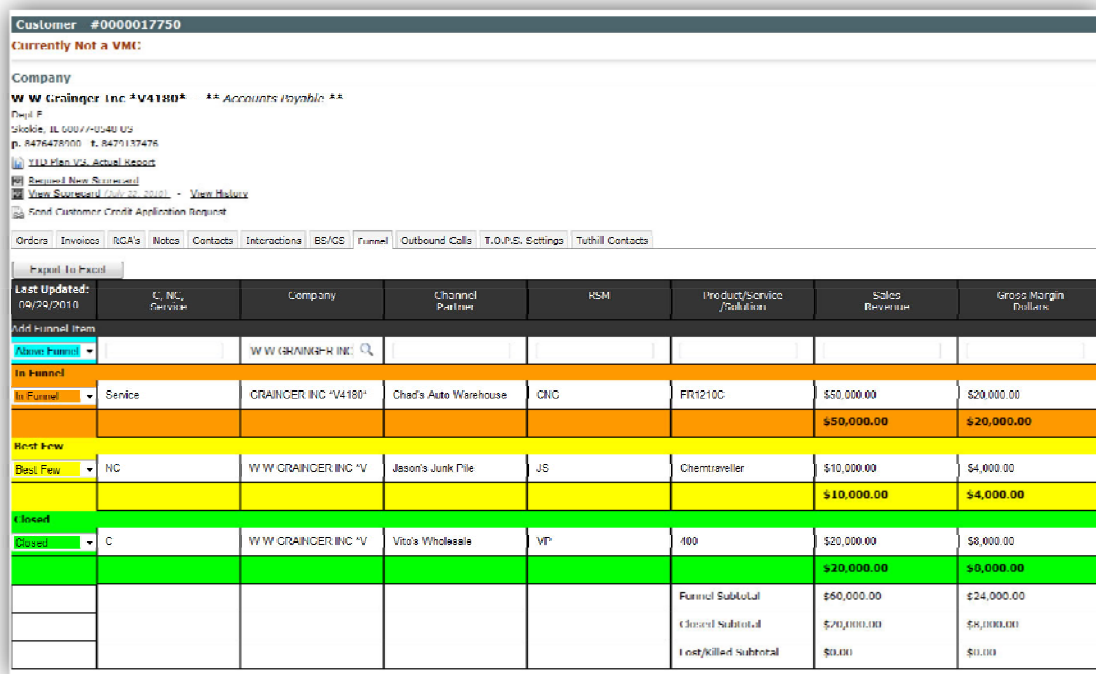
Deleting a Blue Sheet or Green Sheet

1. Click on the **delete** link next to the file you'd like to remove. You will then see a confirmation message like the one below.
2. If you no longer want to delete the file click the **No, Cancel** button
3. Click **Yes, Delete** to delete the file



Customer Tabs - Funnel (Formerly SSI's)

The funnel tab of the Toolbox allows salespeople to track opportunities within their sales funnel. Within the Funnel tab of any customer, Toolbox users can view opportunities and their respective statuses for the selected customer. Salespeople can view a personalized consolidated funnel by clicking on the "My Sales Funnel" link located in the left navigation panel.



Adding a Funnel Item

1. To add a new funnel item start by choosing a funnel category in the first column of the grid
2. Populate all remaining fields within the row of the funnel item that you're adding
3. Click the **Add Item** button at the end of the row to save it

Editing Funnel Item

1. Click into any cell that you'd like to edit and make any changes that you need to
2. Clicking out of each cell will automatically save the data that you have just entered

Deleting a Funnel Item

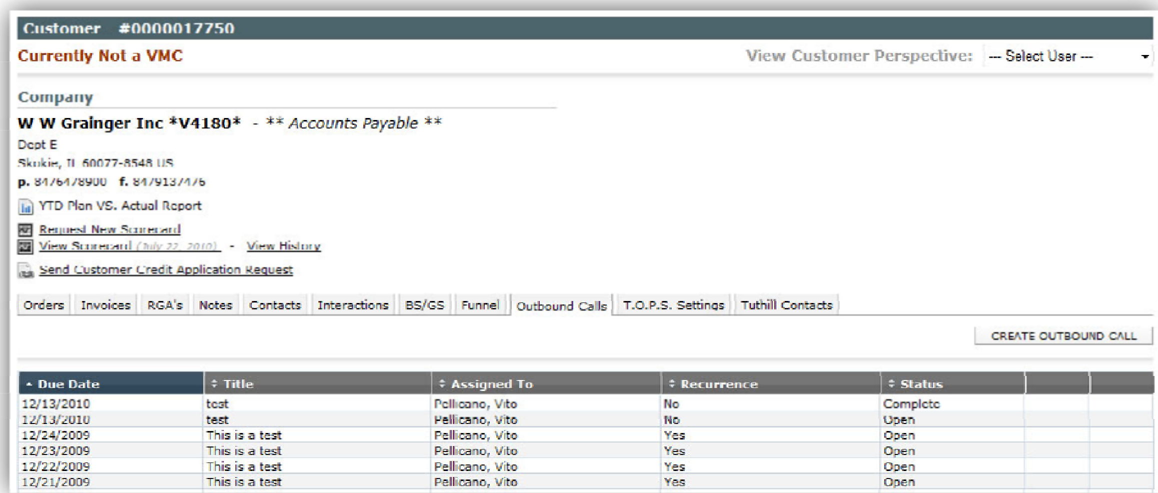
1. Scroll to the right side of the funnel item that you'd like to delete
2. Click on the **Delete** button
3. Click **Yes** when asked if you really want to delete the funnel item, click **No** if you change your mind

Exporting the Sales Funnel to Excel

1. Click on the **Export to Excel** button
2. Click through any warnings that Excel issues as you open the file. These warnings will vary based on the version of Excel that you're using.

Customer Tabs - Outbound Calls

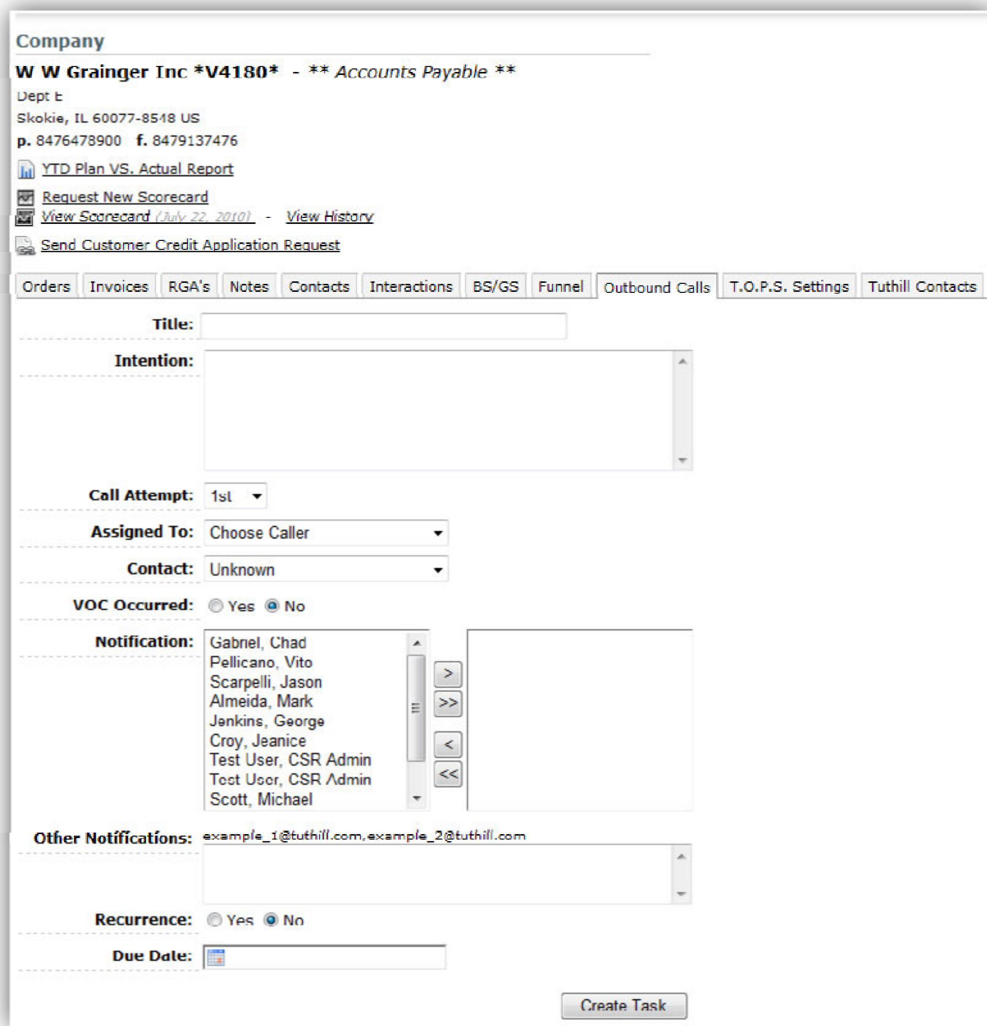
The Outbound Calls tab contains a customer-specific list of outbound calls that selling and customer service have completed and need to complete in the near future. All columns can be sorted in ascending/descending order by clicking on the column header. The navigation buttons at the bottom of the screen will allow you to set how many items are visible per page, go to the next page, previous page, last page, and first page. The information located at the bottom-right tells you how many pages of results there are and which page you are on.



Adding an Outbound Call

1. Click on the **CREATE OUTBOUND CALL** button shown on the screen above. After clicking on that button the screen below will load.

2. Complete all fields on the form below



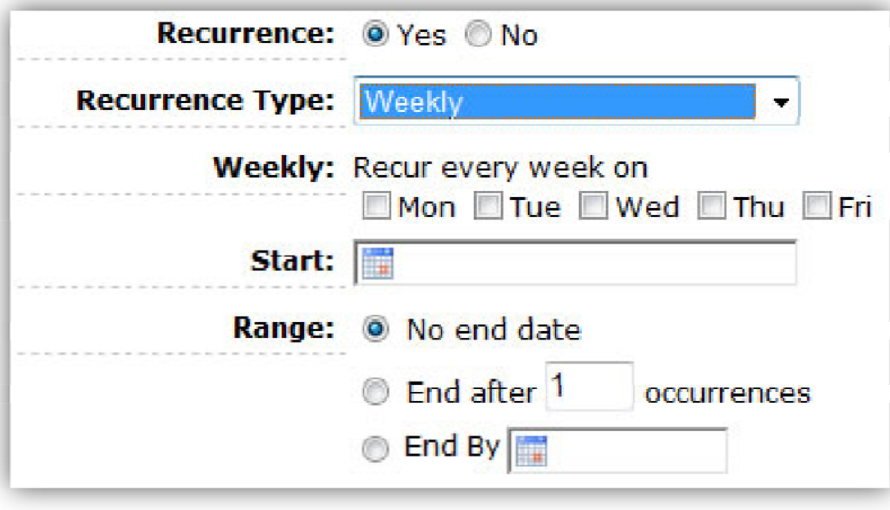
3. Click **Create Task** to save the new call and to send the individual that it's assigned to an e-mail notification

If you choose to create a recurring outbound call like the one pictured below you will need to choose the frequency of the call: Daily, Weekly, Monthly, or Yearly. For any of these three types of recurring calls you'll have to specify a start date and a range. You can have a recurring series of calls be ongoing by choosing "No end date". You can have the series end after a certain amount of occurrences or you can have it end by a specific date.

If you choose Weekly you will be asked which day(s) of the week you'd like this call to be completed on.

If you choose Monthly, you will be asked which date of the month you'd like this call to be completed on.

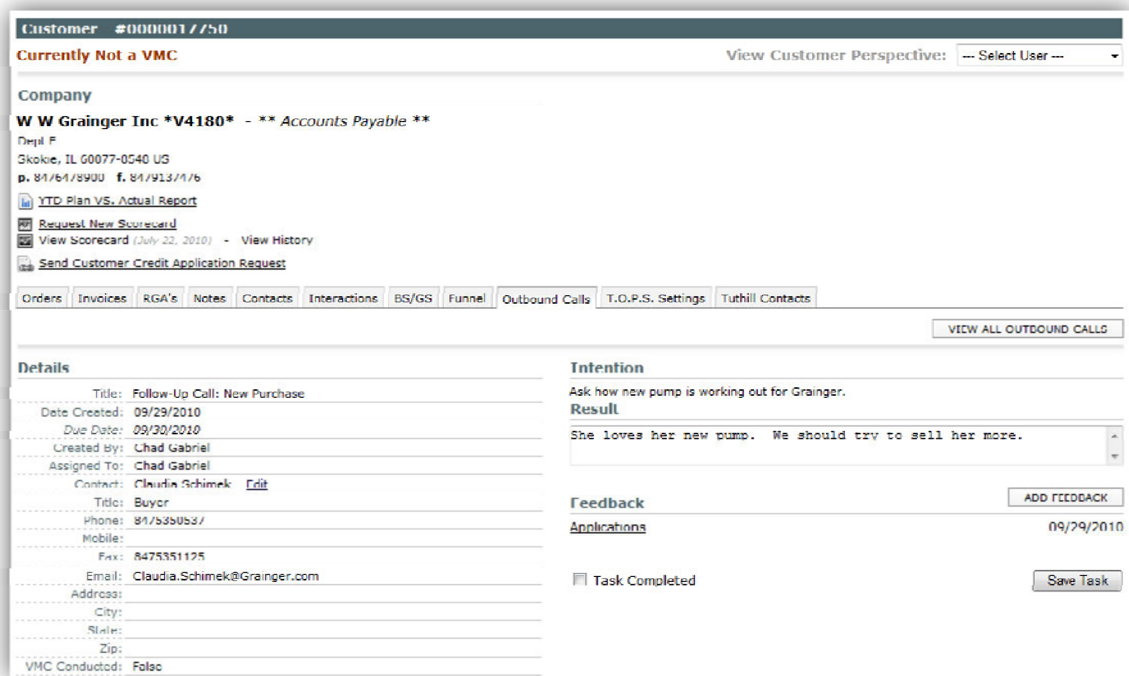
If you choose Yearly, you will be asked which date or which specific weekday (i.e., first Monday of January, last Friday of October)you'd like this call to be completed on.



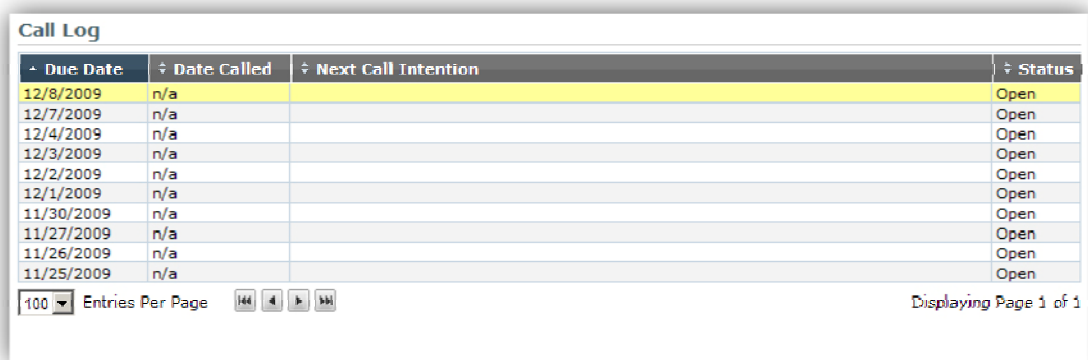
Viewing/Completing Outbound Calls

1. Click anywhere on the row of the Outbound Call you'd like to view. You will see all of the call details along with a place to save the result as shown below.
2. When the call is completed enter your call summary in the Result box and **Add Feedback** for any information that needs to go into the lake room
3. Check the "Task Completed" box

4. Click **Save Task** to save your data.



If the call you're working on is a recurring call you will see a Call Log area as in the screen below. This list contains the due date of a call, the date the call occurred, the next call intention, and the call status. It is made up of all past calls and calls to be made in the next 14 days. Click on any of the calls in this list to view or edit the results of the call. You'll also see a new box called "Next Call Intention", which will aid in gaining clarity over what the intention of the next call is.



Editing Outbound Calls

1. Click on the **Edit** button in the row of the call you'd like to edit from the main list of calls on the Outbound Calls tab.
2. Make any changes to the call that you've selected as shown in the screen below
3. Click **Save Task** to save your changes.

Deleting Outbound Calls

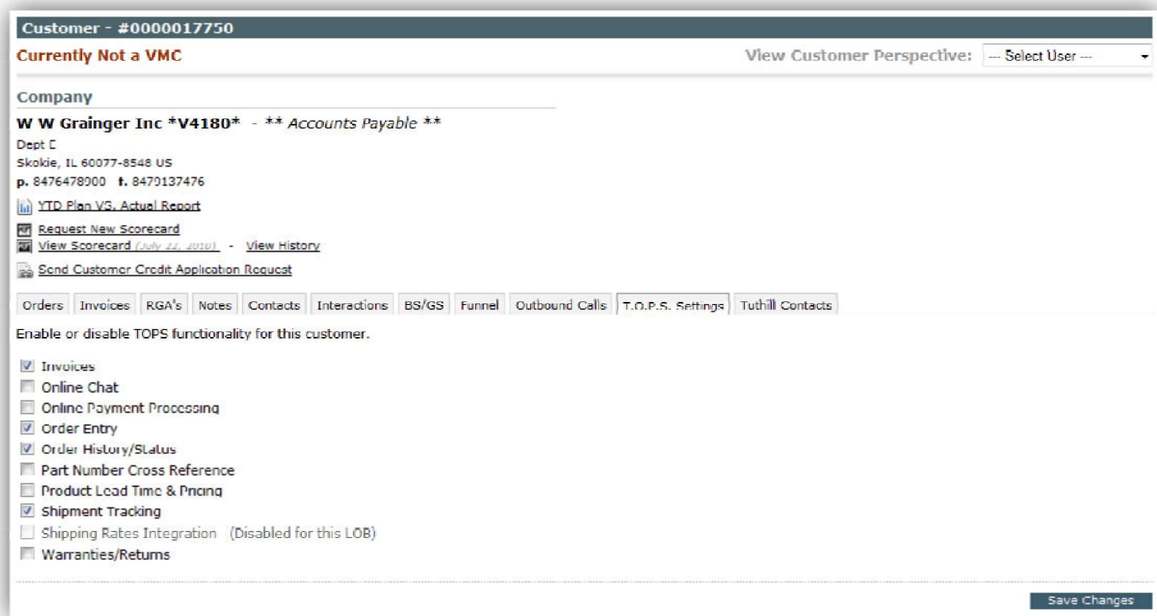
1. Click on the **Delete** button in the row of the call you'd like to delete. You will see a confirmation message like the one shown below.
2. Click on **No, Cancel** if you would no longer like to delete the call.
3. Click on **Yes, Delete** to confirm deletion of the call.

Outbound Calls on the Dashboard

Outbound calls show up on the dashboard in two places. Calls that need to be made by a specific CSR will appear under the section titled "Upcoming Calls". Calls that are past due appear under the section titled "Past Due Calls". A sample of what this looks like is shown below. The dashboard contains calls that are assigned to the user that is signed in to complete, not the user that created them.

Customer Tabs – T.O.P.S. Settings

T.O.P.S. Settings is used to give permission to VMC's for the different functions within T.O.P.S. that they can see. The tab within the customer view contains only the current customer's permissions, not permissions for all customers for your location.

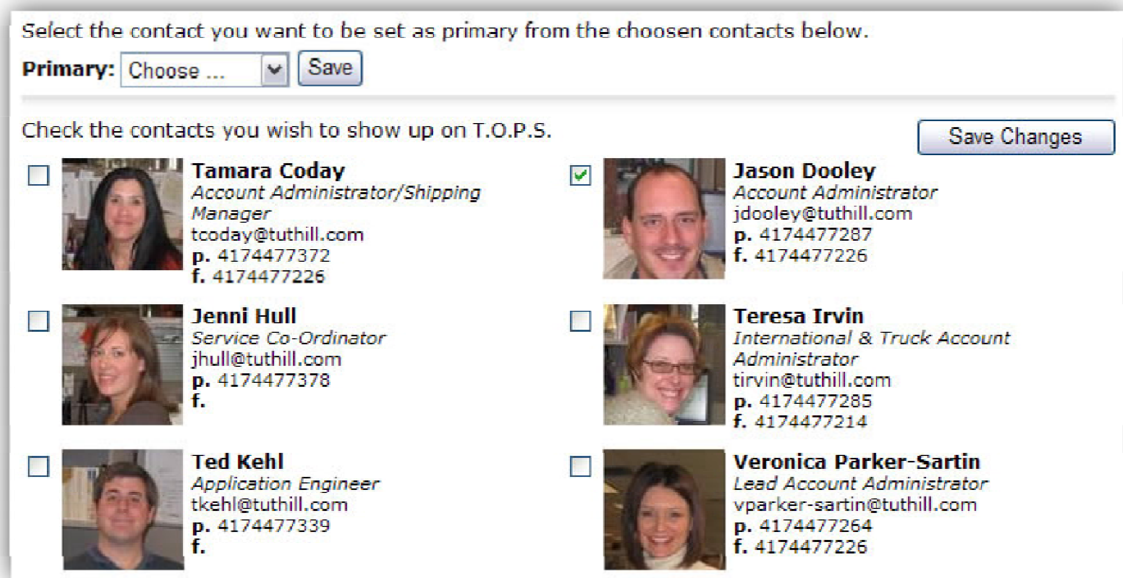


1. Check the boxes next to the permissions that you'd like to enable for this particular customer
2. Click **Save Changes** to save your changes.

Note: Functions that are not enabled for your LOB will appear as options in this list, but will be grayed out with a note stating "Disabled for this LOB". To enable features of T.O.P.S. for your LOB you'll need to select T.O.P.S. Settings >> Permissions from the top navigation menu. Only T.O.P.S. Administrators can do this.

Customer Tabs – Tuthill Contacts

The Tuthill Contacts tab is where we can set the contact(s) for each of our VMC's so that they are in contact with the right Tuthill employee in T.O.P.S.

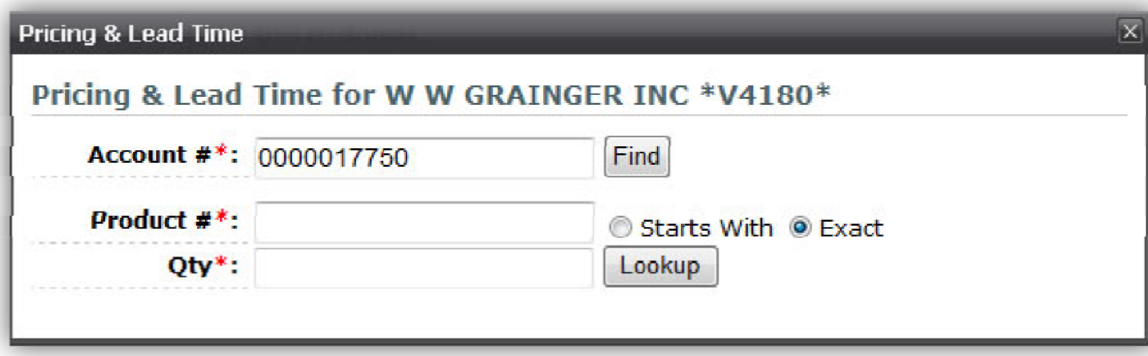


1. Choose the primary contact for this customer. When the customer is prompted to contact their CSR they will be shown this primary Tuthill contact.
2. Check the box next to the contact(s) you'd like to associate with this customer
3. Click the **Save Changes** button

Note: Tuthill Contacts are maintained under the T.O.P.S. Settings area of the Toolbox by Toolbox administrators only. To access this area Toolbox administrators will have to select T.O.P.S. Settings >> Tuthill Contacts from the main navigation menu.

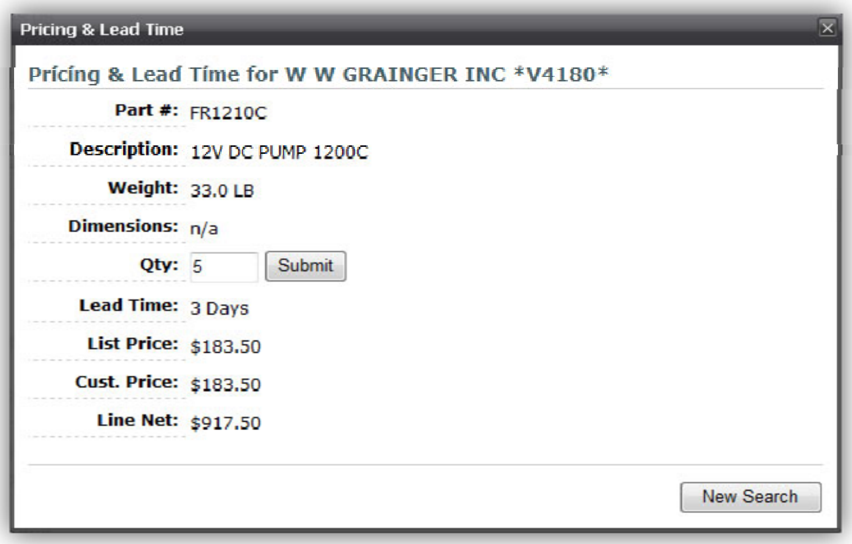
Pricing & Lead Time

1. Click on the **Pricing & Lead Time** button located in the left navigation of any page of the Toolbox



2. Insert customer Account #. If you don't know the customer Account # use the **Find** button to locate a customer's account number using the Customer Locator. This field will already be populated if the Pricing & Lead Time tool is opened within a customer view.
3. If you know the exact Product # select **Exact** and click on **Lookup**. Skip steps 4-5.
4. If you do not have the exact Product #, input the first three (3) characters and select **Starts With** and click on **Lookup**. This will return a list of matches.
5. Choose the product from the list by clicking on it.

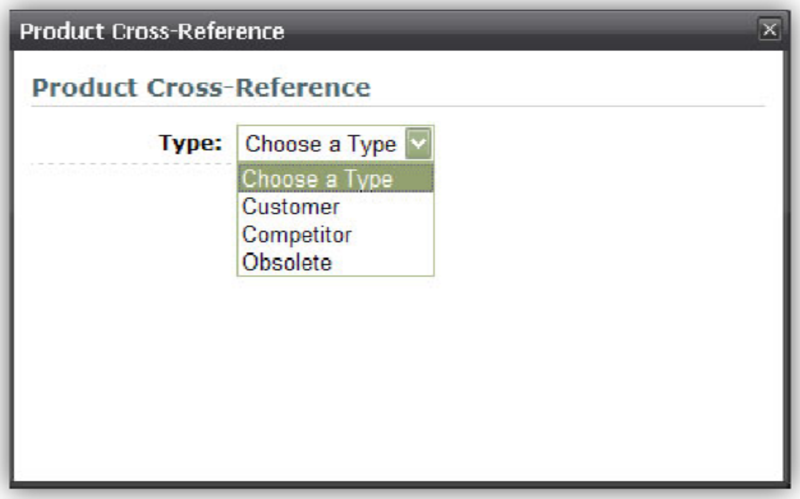
Below is the results window that will appear for a pricing/lead time inquiry.



6. If necessary, adjust the quantity being inquired and click **Submit** to get updated results
7. To perform another search click on **New Search** otherwise, click the **X** to close the window

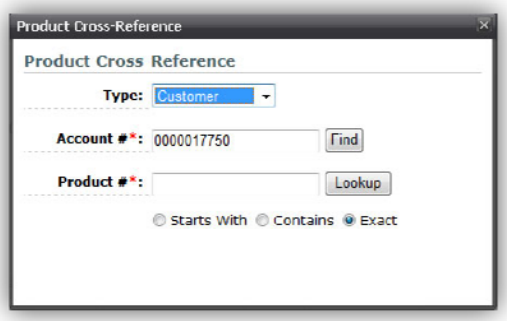
Product Cross-Reference

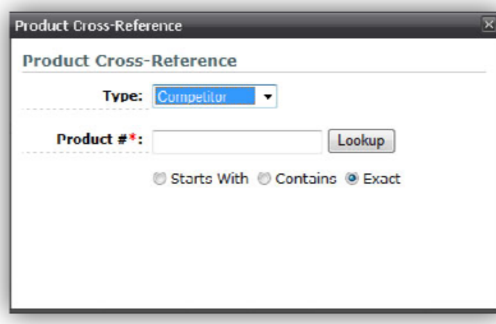
The product cross-reference tool allows Toolbox users to lookup Tuthill part numbers by entering customer, competitor, or obsolete part numbers.



1. Choose the type of part number you are using to cross reference:
    a. Customer – Is the customer's part number
    b. Competitor - Is the competitor's part number
    c. Obsolete - Is an old Tuthill part number

After making a selection, one of two following screens will load. If you chose "Customer" you will see the left screen below. For "Competitor" or "Obsolete" you'll see the right.



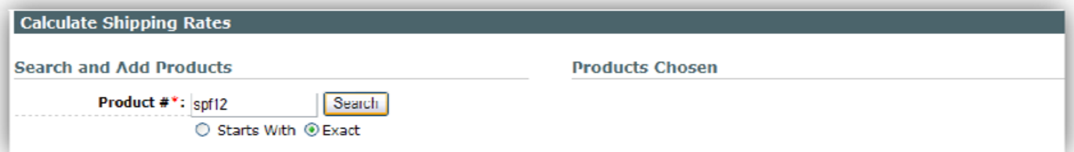


2. For customer lookups insert customer Account #
3. Insert Product #
4. Click the **Lookup** to see the Tuthill Product #. You can lookup the price and lead time from this page by clicking on the link provided.

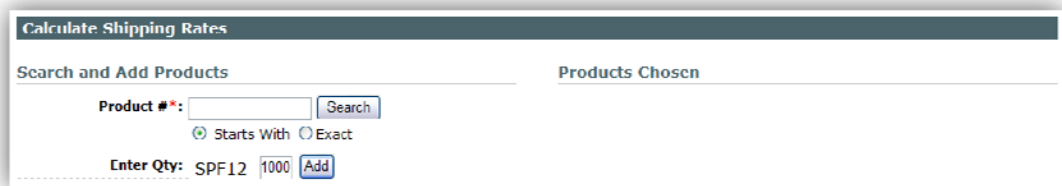
Calculate Shipping Rates

For U.S. locations using Tranzact as their shipping rate provider, Toolbox users can calculate shipping rates for orders.

1. Type in the product you would like to see shipping rates for
2. Click the **Search** button

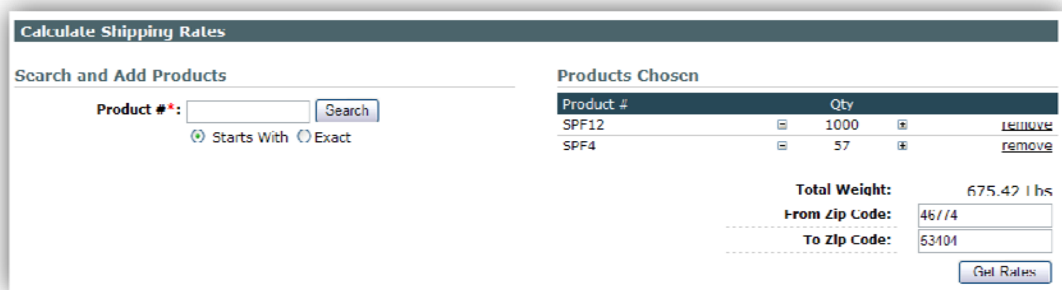


3. Enter the quantity and click **Add**.



You can add more parts by searching more products and adding the quantity desired.

4. Enter the From and To Zip Codes



5. Click the **Get Rates** button to get a real-time rate lookup provided by Tranzact.

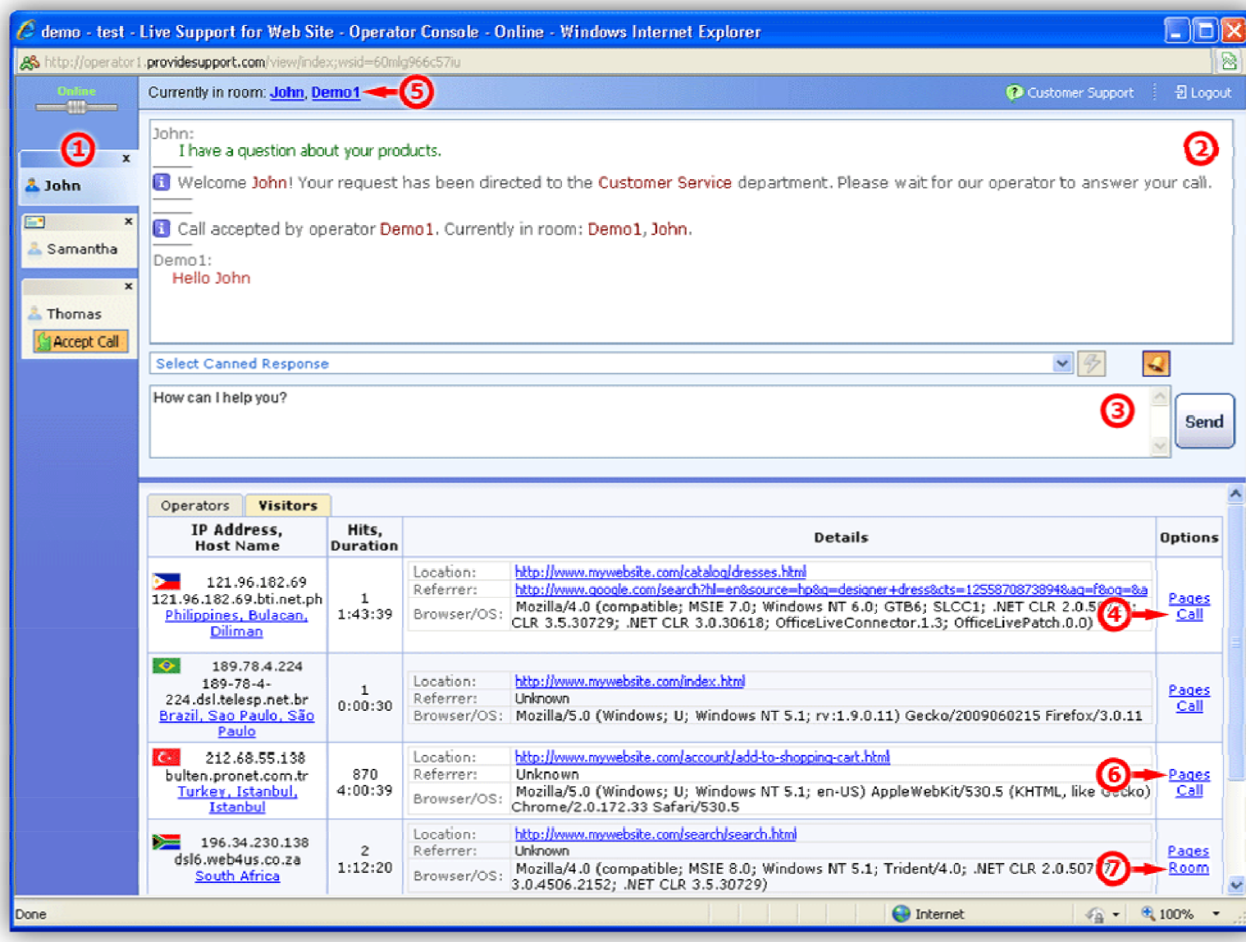
Chat (Web-based Operator Console)

The web-based Operator Console is opened in a browser window. It looks like a webpage. Its URL is http://operator.providesupport.com.

As you can see from the comparison chart, the web-based Operator Console is less powerful than the Stand-alone one. But it still can be useful for operators who travel a lot and work from different computers, who cannot install the stand-alone Operator Console due to some security policy, etc.

The web-based Operator Console is common for different operating systems: Windows, Mac OS, Linux. It supports most of popular browsers.

The console has the following look:



Web-based Operator Console

1. Each chat session appears as a separate "room tab" labeled with visitor's name.

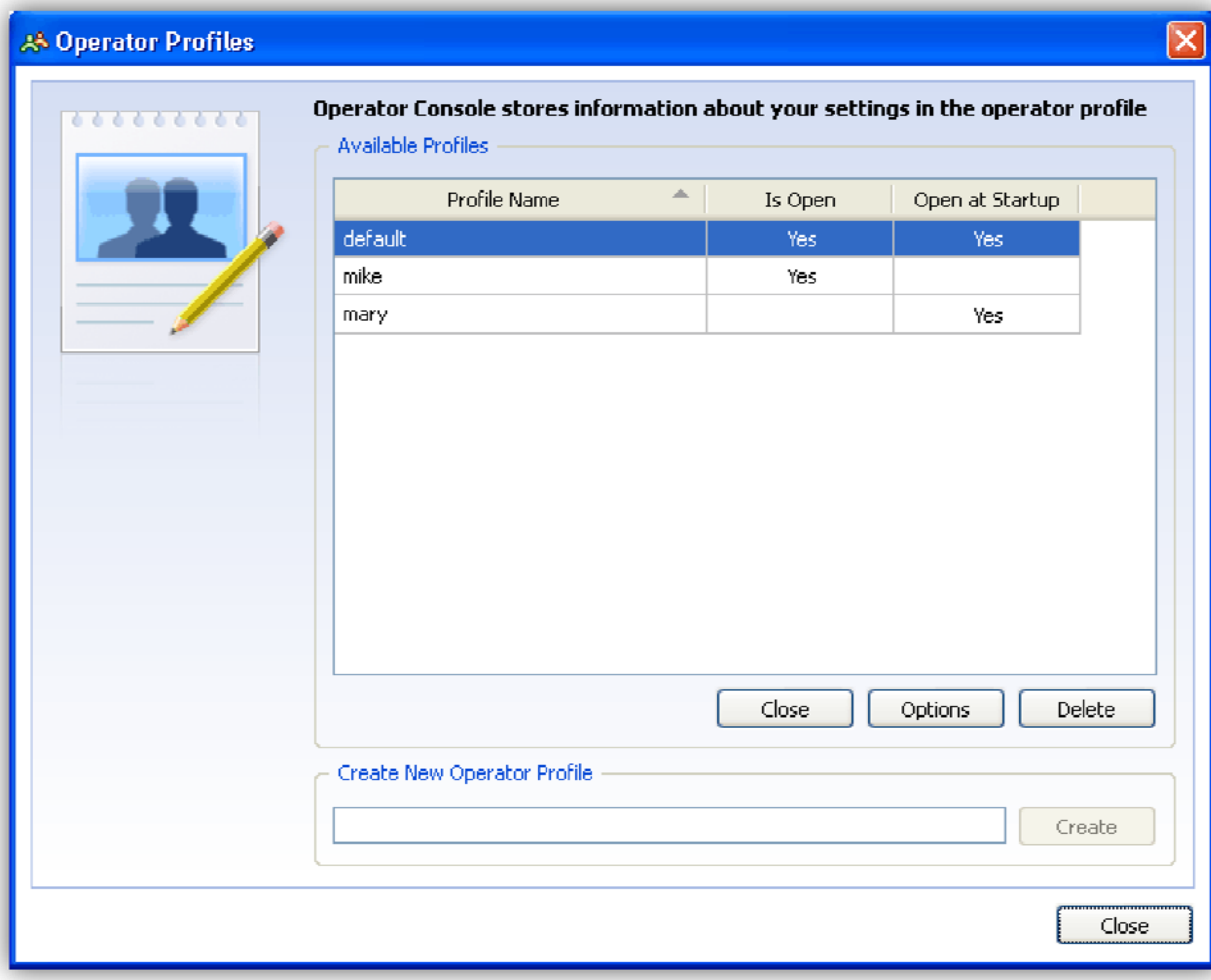
2. Operator's, visitor's and system messages are displayed in the main messages area.
3. Chat messages are typed in the text input area. All world languages are supported.
4. You can proactively invite your website visitors to chat.
5. You can see the active chat session participants' details (both visitors and operators).
6. You can see your website visitors' navigation history.
7. You can switch the console to the chosen visitor chat tab.

Chat (Windows-Based Operator Console)

Profile Manager

Profile Manager in the stand-alone Operator Console allows creating and managing several profiles with different options (e.g. connection settings, login information, regional options, console behavior on different events, etc.). This can be useful if several operators share one Operator Console using one computer or if one operator monitors several accounts from one computer.

To open Profile Manager please use **Tools / Profile Manager** menu item in the console.



Profile Manager

Note! Profile in the console is not the same as operator profile in the account Control Panel. They are responsible for completely different options.

Working with Profiles

Open

To start **using the profile**, you need to **open** it. To open the profile please do the following:

1. Choose the profile in **Available Profiles** list
2. Click **Open** button

You can have several profiles opened in the console simultaneously. This can be useful if you need to monitor several accounts or act as several operators. Each opened profile has **its own icon in the system tray** and is marked with **Yes** in **Is Open** column in **Available Profiles** list.

Close

To **stop using the profile**, you need to **close** it. To close the profile please do the following:

1. Choose the profile in **Available Profiles** list
2. Click **Close** button (it appears instead of **Open** button for opened profiles)

or

1. Right click the profile **tray icon**
2. Click **Close** item in tray icon menu

Managing profiles
Create

To create a new profile please do the following:

1. Open Profile Manager
2. Enter new profile name in **Create New Operator Profile** field
   Note! This field accepts only Latin letters, numbers, dashes (**-**), underscores (_) and spaces.
3. Click **Create** button

The new profile with default settings will appear in **Available Profiles** list. You can adjust the profile's settings to fit your needs.

Edit

To edit a profile please do the following:

1. Open Profile Manager
2. Choose the profile in **Available Profiles** list
3. Click **Options** button

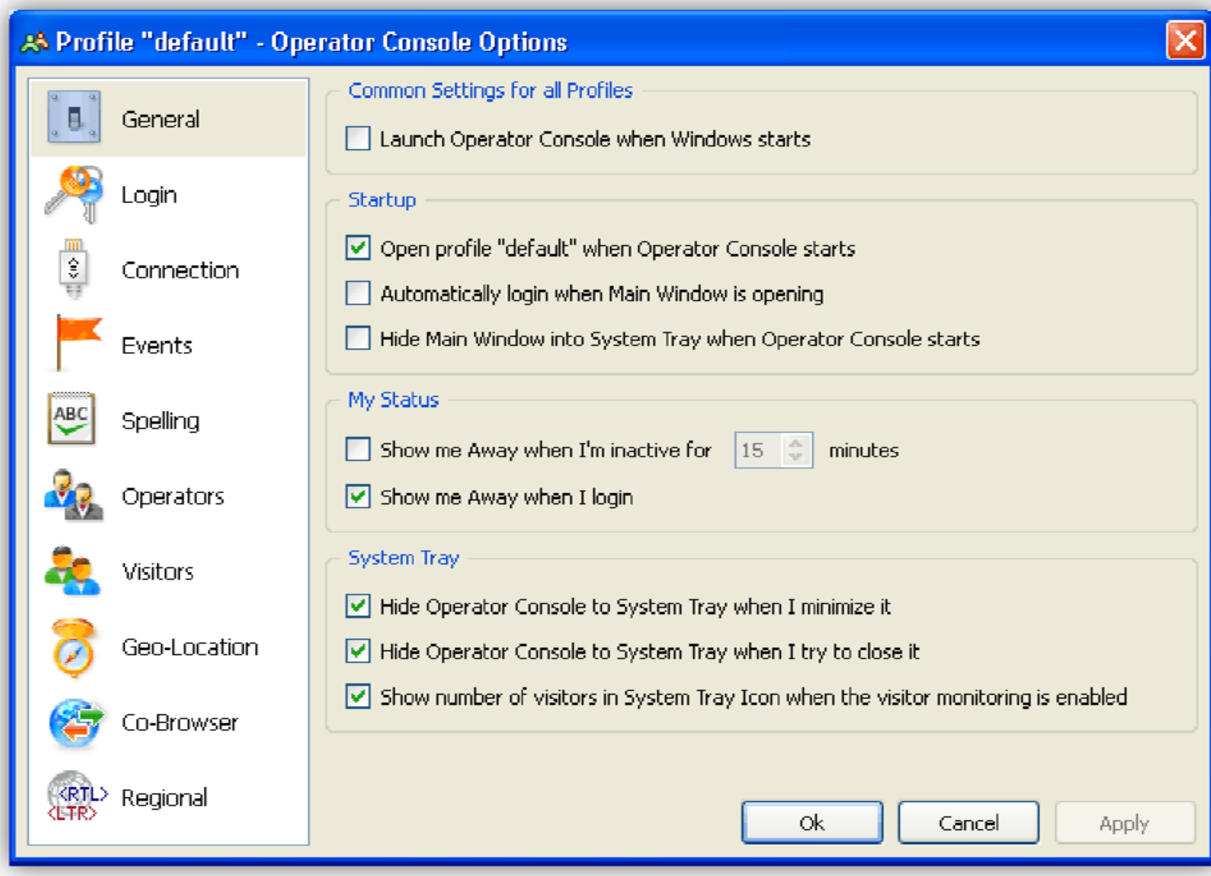
Delete

To delete a profile please do the following:

1. Open Profile Manager
2. Choose the profile in **Available Profiles** list
3. Click **Delete** button
4. Confirm deleting the profile

General

This tab contains all general profile settings.



General tab

Common Settings for all Profiles

Launch Operator Console when Windows starts option is common for all profiles. If you enable it in one profile, it will be enabled in all profiles and vice versa. If this option is enabled, the console will be launched on the system start.

Startup

This set of options is responsible for the console behavior on the console startup.

> Check **Open profile "profile_name" when Operator Console starts** option if you wish the profile to be opened automatically when the console starts. You can enable this option for several profiles if needed, all of them will be opened automatically and a tray icon for each of them will be created in the system tray. **Note!** This option should be enabled for at least one profile. So if you whish to

disable it for your profile and it is grayed out, please enable it for some other profile first and then disable for the needed profile.
Check option **Automatically login when Main Window is opening** if you wish the console to automatically login using your operator login information from Login tab. Please note that as soon as the console is logged in, you may receive chat calls.
Check option **Hide Main Window into System Tray when Operator Console starts** if you don't wish the console window to be maximized after it starts.

My Status

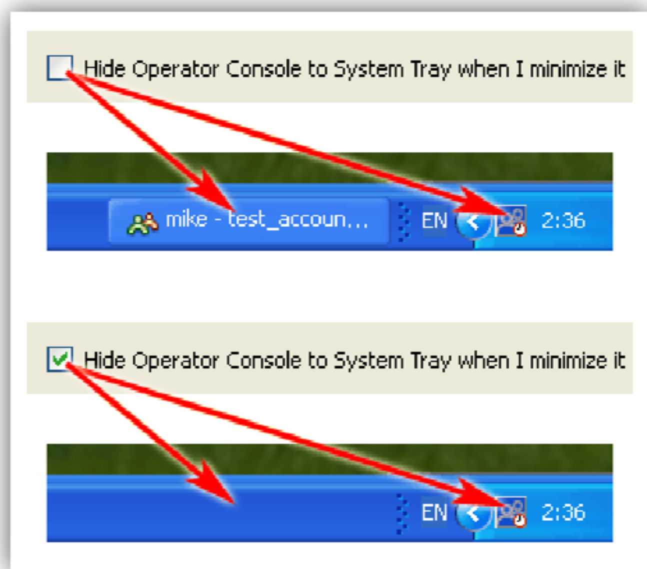
This set of options is to manage switching the console **Away** status.

Check **Show me Away when I'm inactive for X minutes** option if you wish the console to automatically switch to **Away** status after X minutes of the computer idle time. This option can be useful if you step away from your computer often and don't wish to miss calls.
Check **Show me Away when I login** option if you with the console to automatically switch to **Away** status right after logging in. This option can be useful if you are going to only monitor your website and don't wish to receive chat calls.

System Tray

This set of options is to manage the console icon in the system tray.

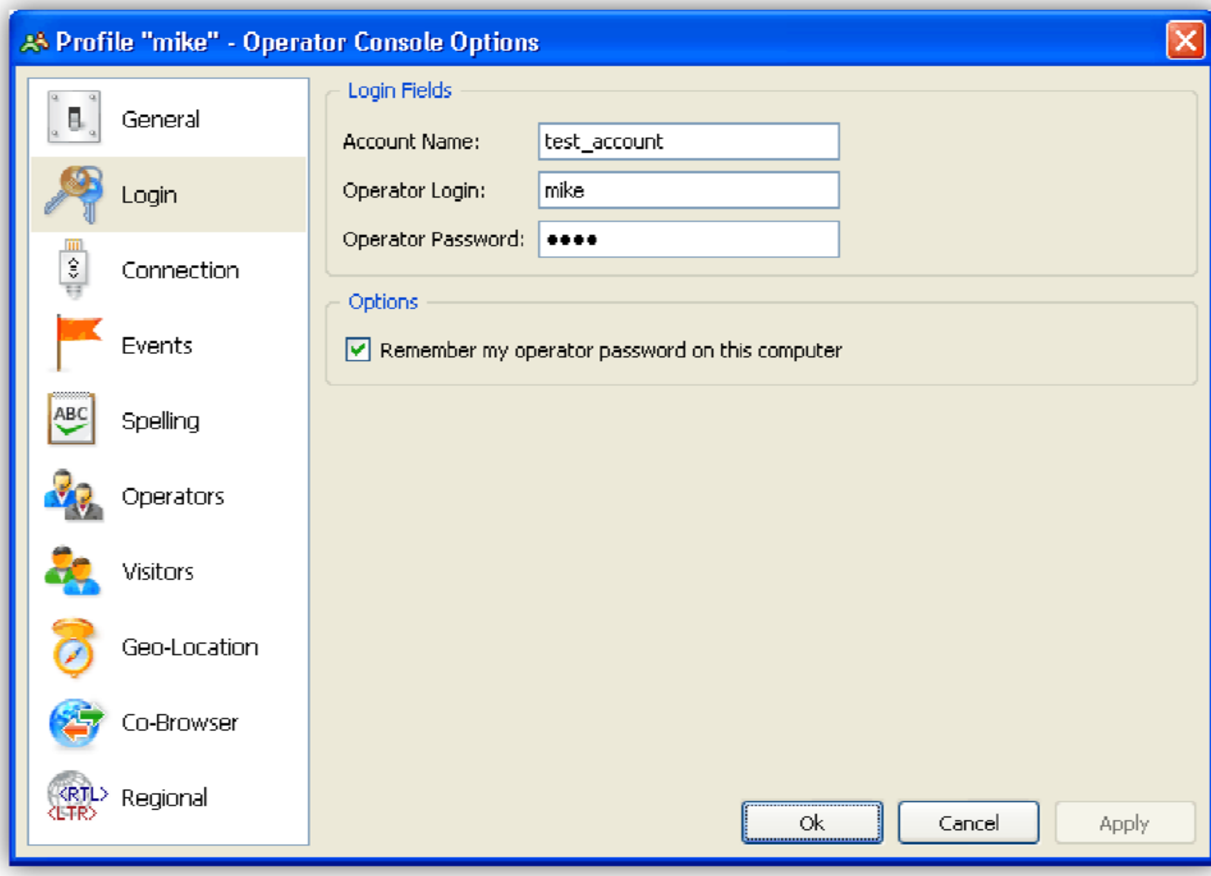
Check **Hide Operator Console to System Tray when I minimize it** option if you don't wish the console always stay in your taskbar when minimized.



Check **Hide Operator Console to System Tray when I try to close it** if you you wish to minimize the console by clicking **Close (X)** button on the console main window. This option can be useful if you don't wish to close the console accidentally. We advise you to keep this option enabled.
Check **Show number of visitors in System Tray Icon when the visitor monitoring is enabled** option if you wish to see the number of your website visitors even if the console is minimized. **Note!** This option works only when the visitor monitoring is enabled (Visitors or Geo Location tabs opened).

Login

Your operator login information is stored in this tab.



Login tab

Login Fields

You can specify your **account name**, **operator login** and **operator password** in order not to enter them each time the console logs in.

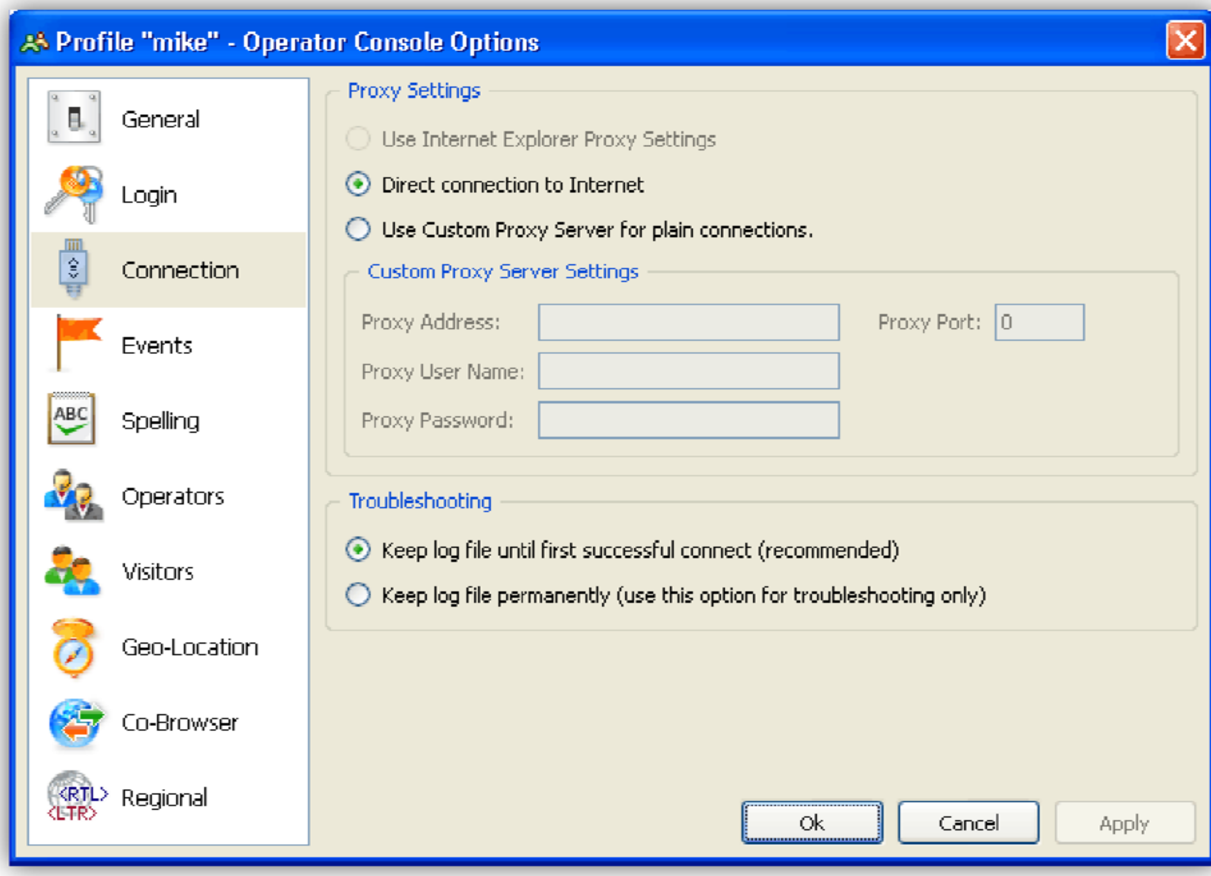
Options

Check **Remember my operator password on this computer option** if you wish not to enter your operator password each time the console logging in. The password will be stored by the console in this case.

Note! Enabling this option may be unsafe if you are not the only user of the computer as everybody will be able to login to the console using your login details.

Connection

You can specify connection options for your console in this tab.



Connection tab

Proxy Settings

Please note that if you use a proxy server, the connection to our servers could be worse because of the proxy unreliability.

You can choose one of three possible variants:

> **Use Internet Explorer Proxy Settings -** the console will use the same proxy settings as used in your Internet Explorer browser
> **Direct connection to Internet -** no proxy settings will be used by the console
> **Use Custom Proxy Server for plain connections -** you need to specify custom proxy settings for the console if you choose this option

Note! Proxy settings are applied only if plain connection is enabled in your account Control Panel. For secure connection (SSL) only direct connection to Internet is used.

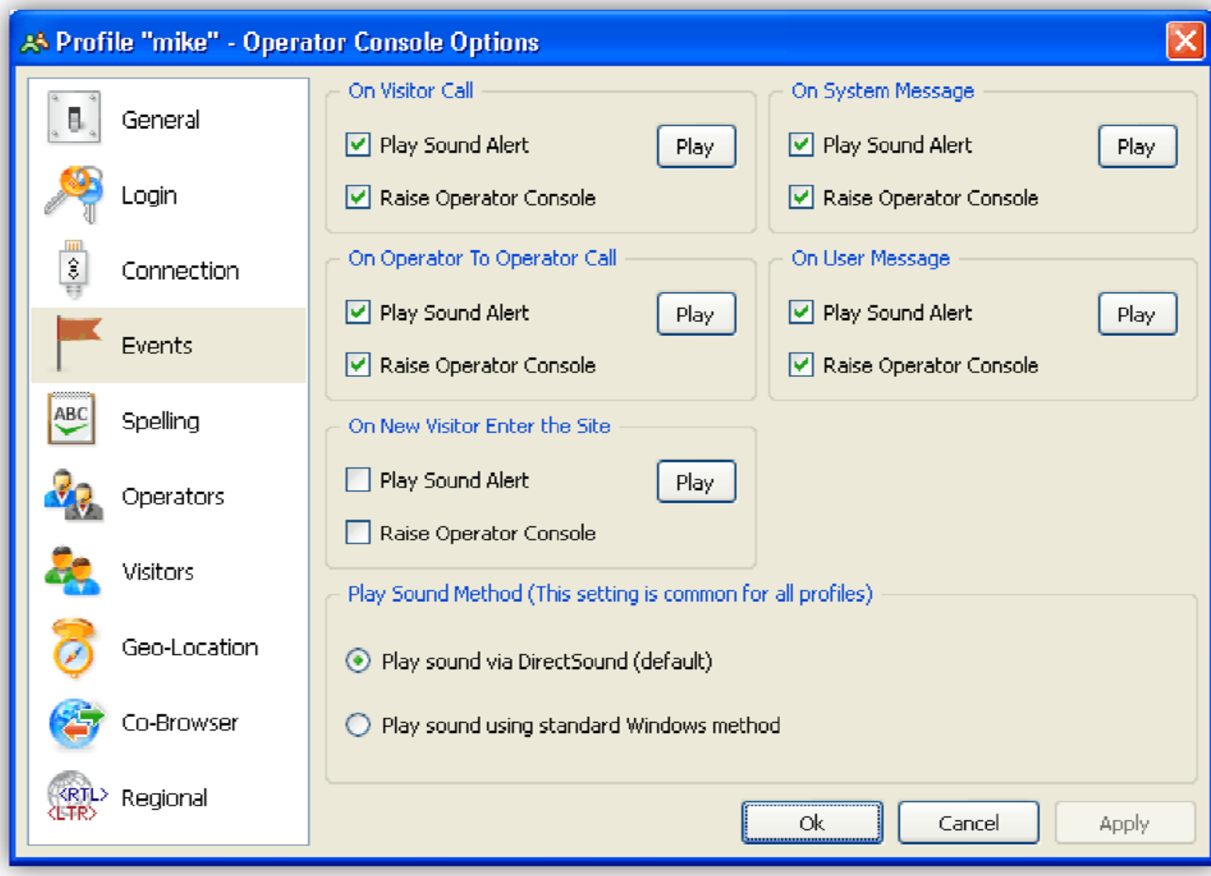
Troubleshooting

You can choose one of two possible variants:

- **Keep log file until first successful connect -** please choose this option if your console works well
- **Keep log file permanently -** this option is needed for troubleshooting purposes only. Using it permanently can cause the log file fast growth

Events

You can setup visual and sound alerts on certain events, e.g. visitor call, new visitor enter the site, etc.



Events tab

Alerts

Sound alert plays a certain **sound** on certain events. Please click **Play** button in the particular event section to listen to the alert sound. Please check **Play Sound Alert** option in the particular event section to enable this alert.

Visual alert raises the console **up**. Please check **Raise Operator Console** option in the particular event section to enable this alert.

Events

On New Visitor Enter the Site

This event works only if monitoring is enabled (Visitors or Geo Location tab is opened) in the console.

Other events

Other events (On Visitor Call, On Operator To Operator Call, On System Message, On User Message) work all the time the console is logged in.

Play sound method

You can choose either DirectSound or standard Windows method to play alerts sounds. This option can be useful if you are experiencing some problems with playing alerts in the console.

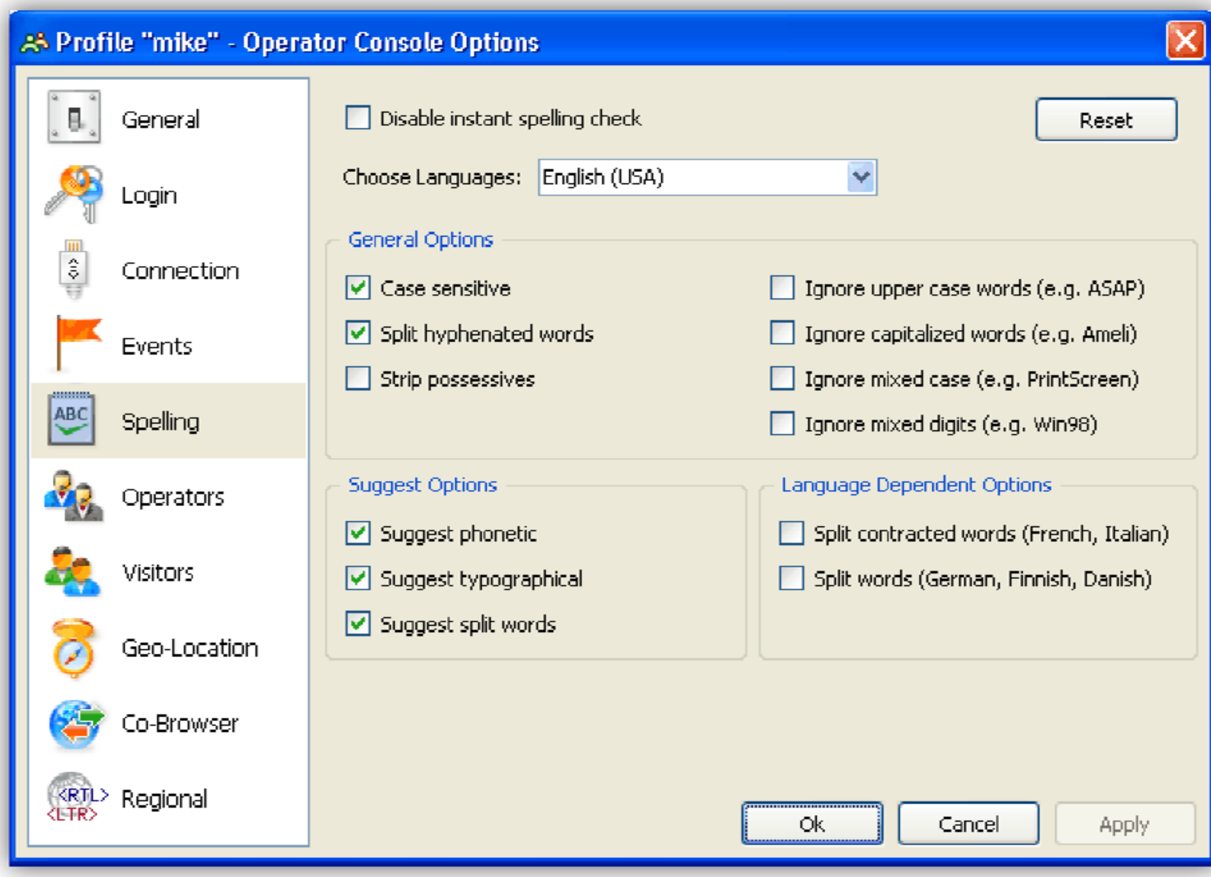
Custom sounds

You can change the sound for any alert. To do this you□d need to place your own sound files into the C:\Program Files\Provide Support\Live Support Chat for Web Site\sound folder. If you've installed the console to some custom location, then you'd need to change files in this custom folder.

Note! You should keep the file name and format, otherwise the sound won't be picked up by the console.

Spelling

Spell checker with **US, Canadian** and **British English** dictionaries, and with dictionaries for **Danish, Dutch, Finnish, French, German, Italian, Norwegian, Portuguese (both Brazilian and Portuguese), Spanish** and **Swedish** languages, is built into the Operator Console and ready to use. It automatically checks your spelling while you're typing your message and highlights words that might be spelled incorrectly.

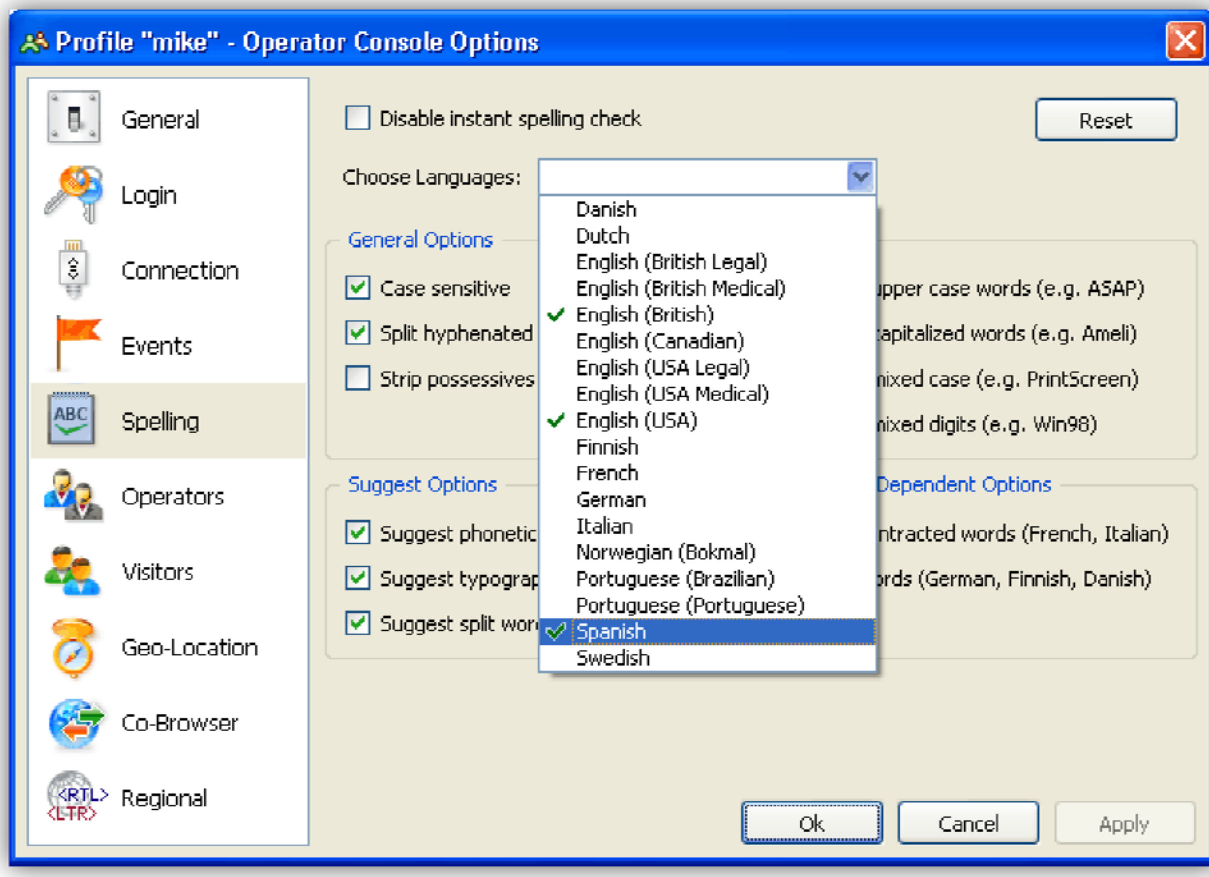


Spelling tab

Options

To enable spell checker please check off **Disable instant spelling check** option.

Then please choose the needed languages in **Choose Languages** box. You can choose **several** languages e.g English (USA) and English (British) and Spanish. All chosen languages will be marked with a green mark like on the following screenshot.



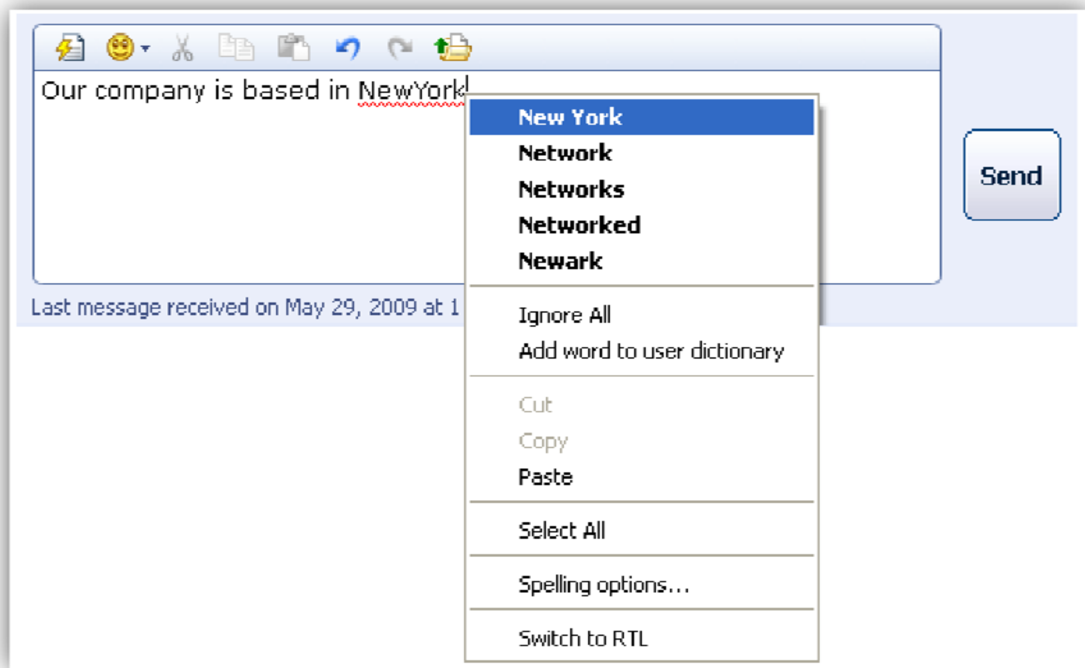
How to choose several languages in spell checker

To setup spell checker to fit your needs, please choose needed options in **General Options**, **Suggest Options** and **Language Dependent Options**.

You can always reset spell checker options to the default configuration with **Reset** button.

Check spelling

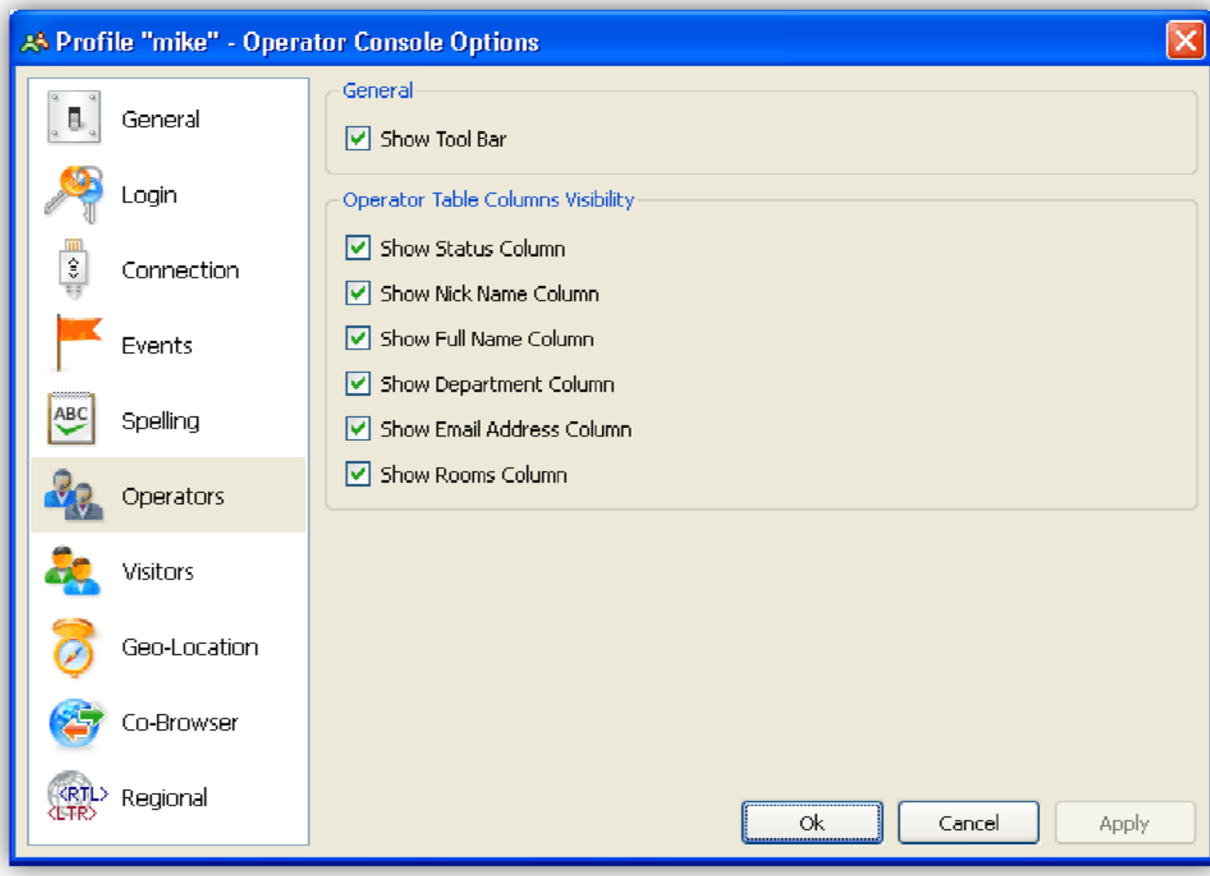
Incorrectly spelled words are underlined with red by the spell checker. You can right click such words and the spell checker will suggest you all possible variants of the word spelling. You can choose one of them or add your word to the dictionary (if it is spelled correctly) or ignore the correction.



How the spell checker works during the chat

Operators

You can customize **Operators list** appearance in this tab.

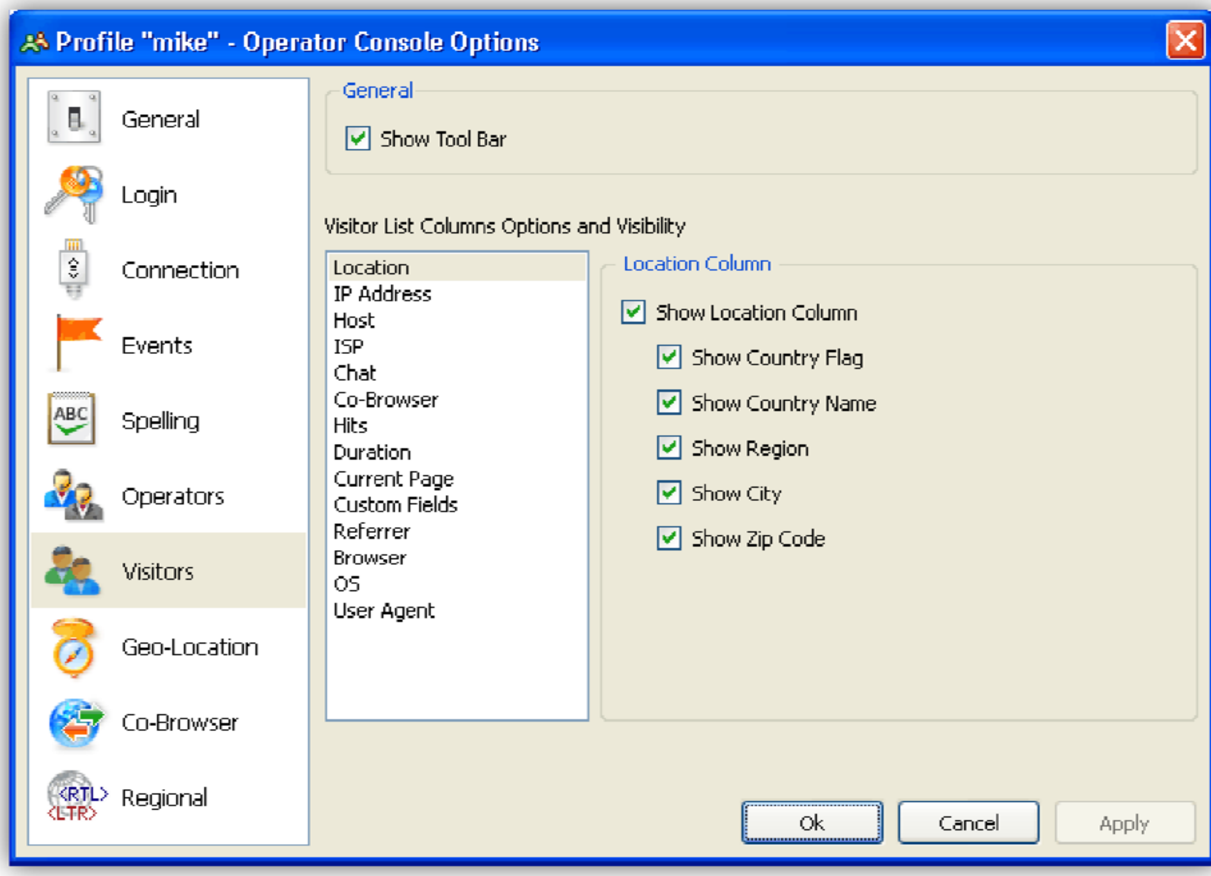


Operators tab

All information checked on this tab will be displayed in Operators list columns.

Visitors

You can customize Visitors list appearance in this tab.

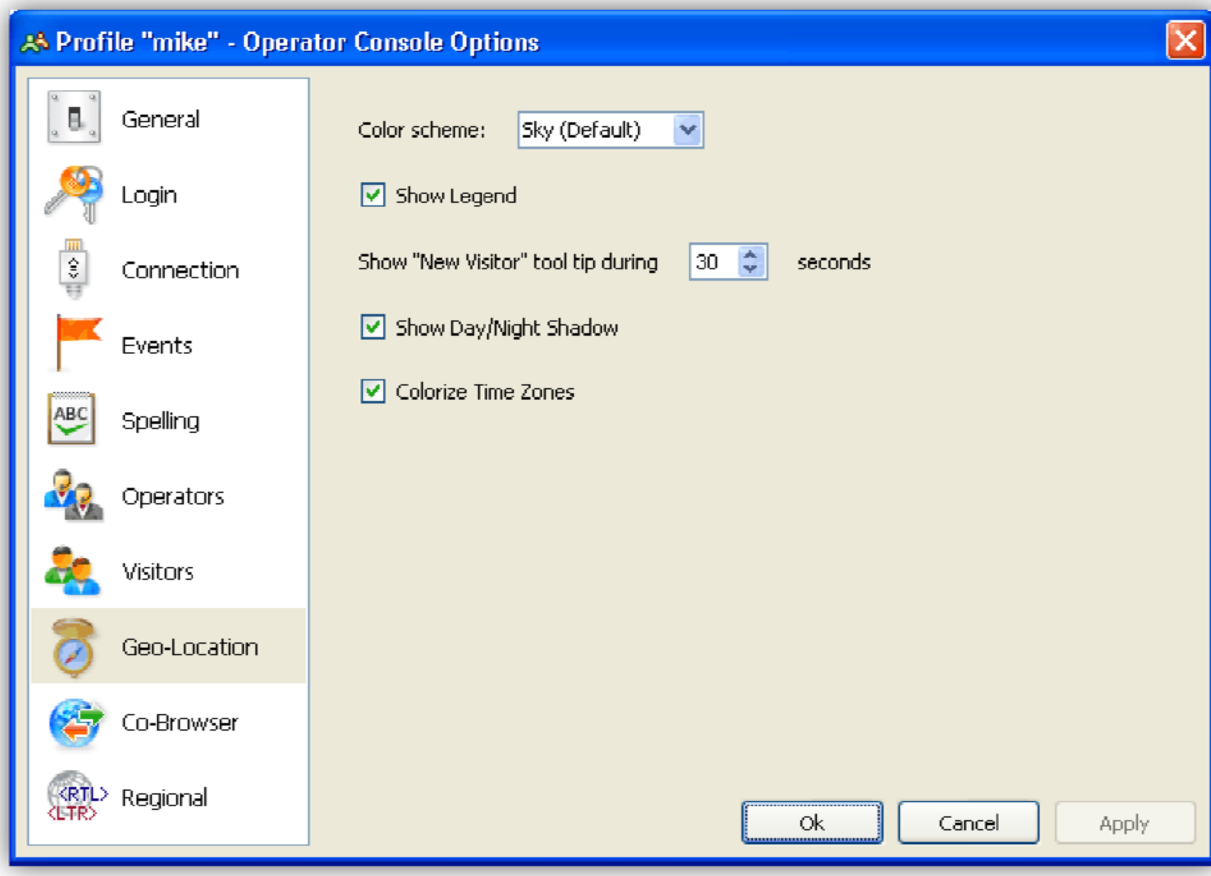


Visitors tab

All information checked on this tab will be displayed in Visitors list columns.

Geo Location

You can change the Geo Location map appearance in this tab.



Geo Location tab

We offer two color schemes for the map:

Sky is the default one. It fits the console colors
Mission Control is like a computer game map

You can choose the scheme you like more.

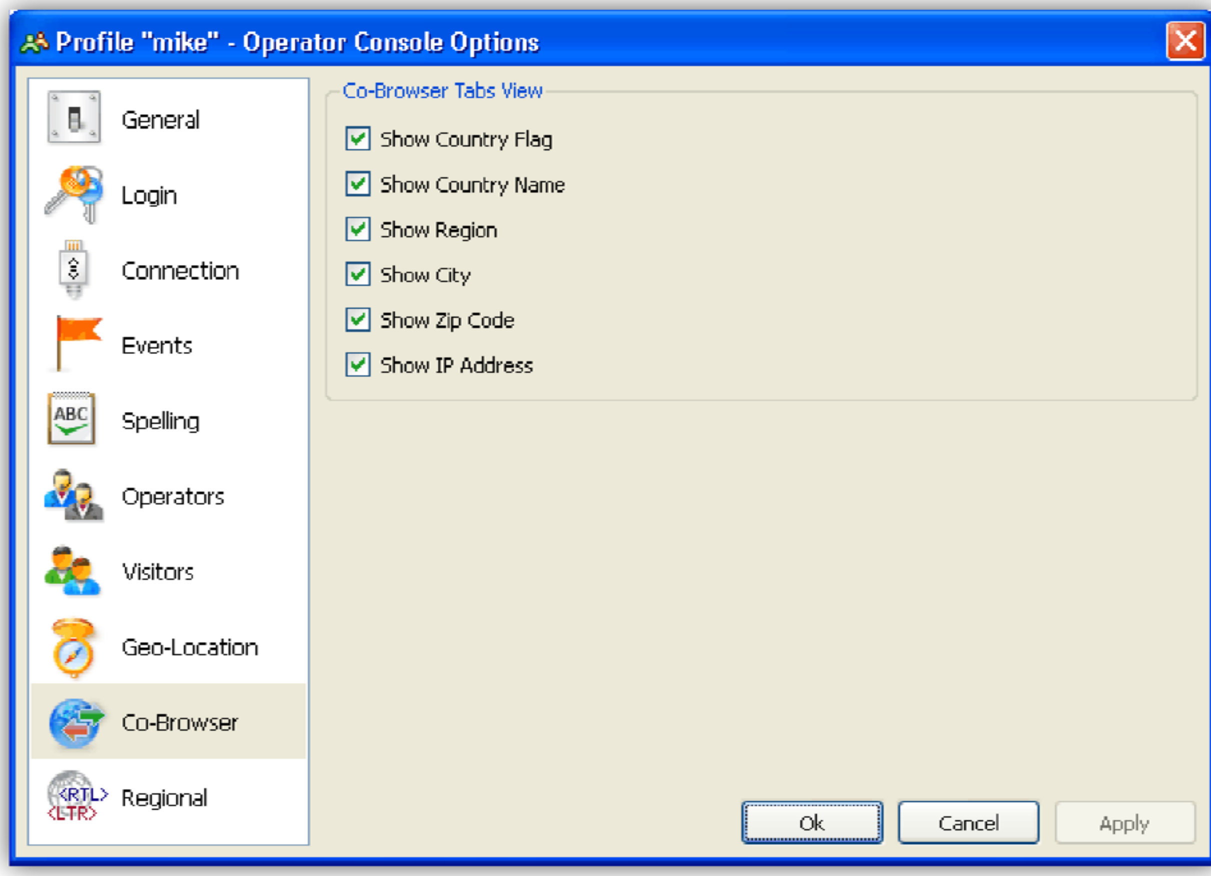
Show Legend option hides/shows the legend in the map's left bottom corner. You can also hide/show the legend via context (right mouse button click) menu on the Geo Location tab in the console.

With **Show "New Visitor" tool tip during X seconds** option you can setup for how long the **NEW** tool tip over new visitors' marks should be displayed on the map.

Use **Colorize Time Zones** and **Show Day/Night Shadow** options to be able to see in what time zone your visitors are and to check if there is day or night in their location.

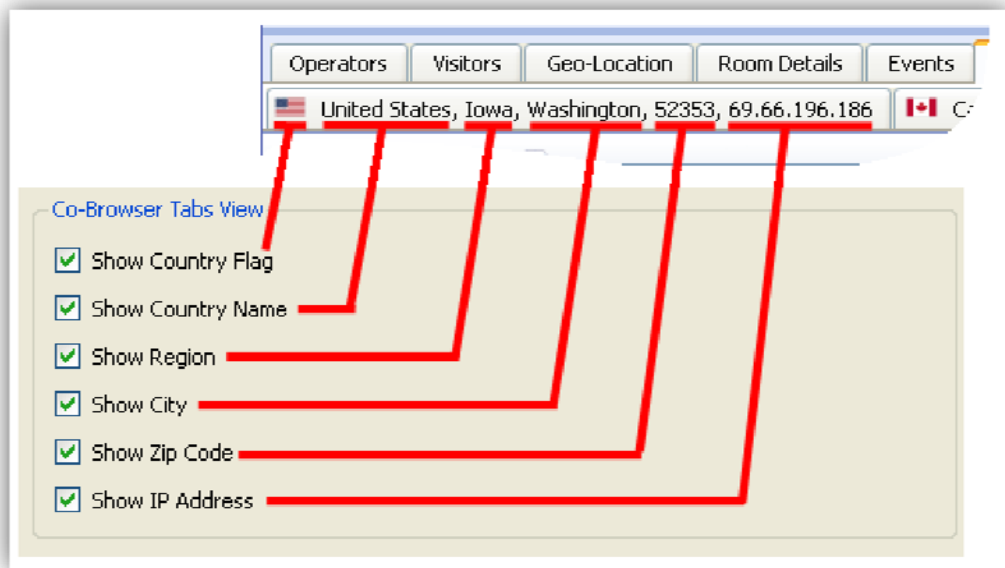
Co-Browser

You can change the **Co-Browser headers** appearance in this tab. Headers appear in the Co-Browser when two or more Co-Browser sessions are opened in the console.



Co-Browser tab

The information in Co-Browser headers will be copied from the visitor information in Visitors tab of the console in the following way:

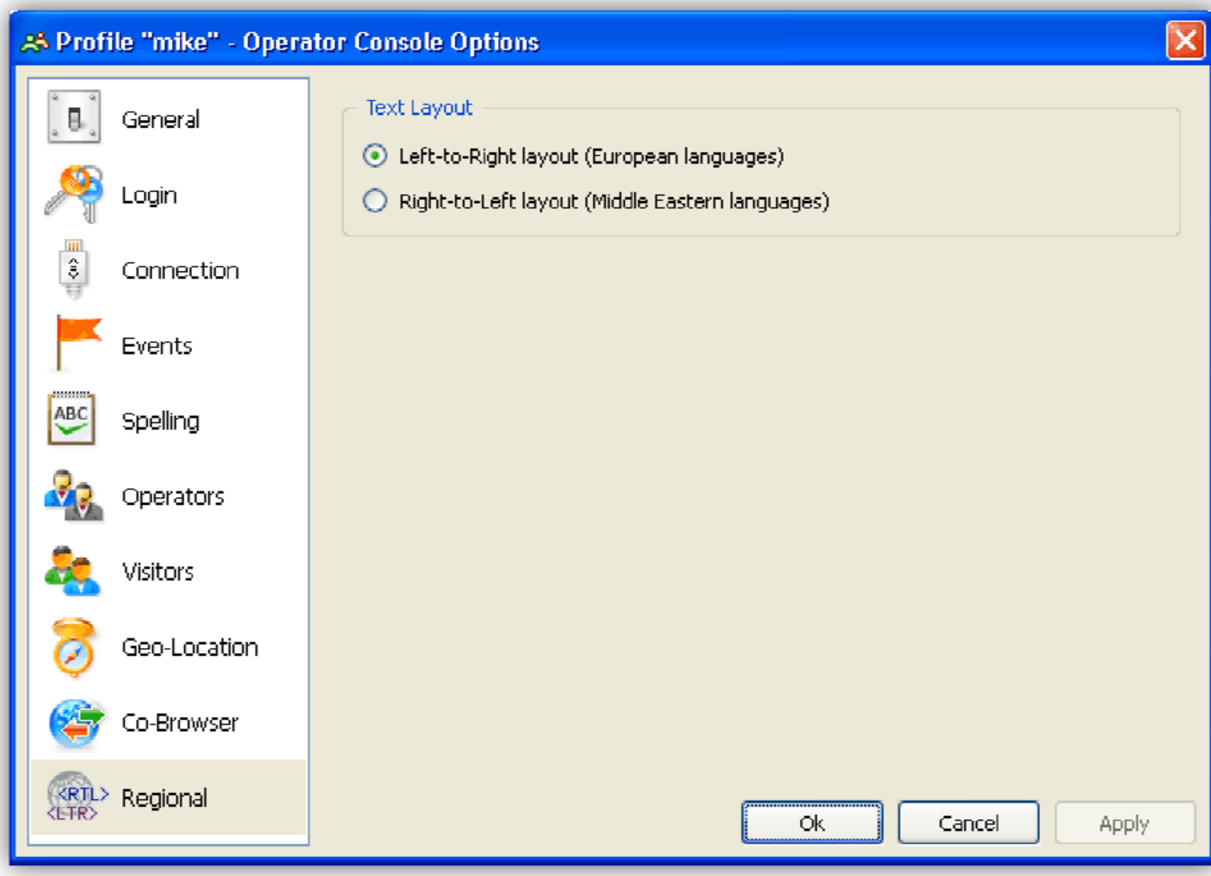


How settings on Co-Browser tab are applied to Co-Browser headers

Regional

You can choose the **text layout mode** for the Operator Console in this tab. Text input and chat history areas will be in RTL mode if **Right-to-Left layout** is enabled.

3

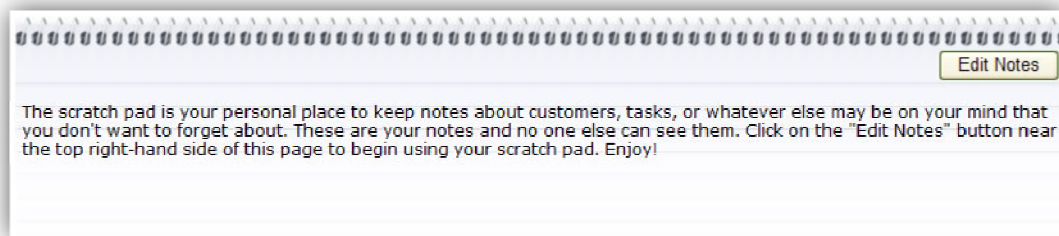


Regional tab

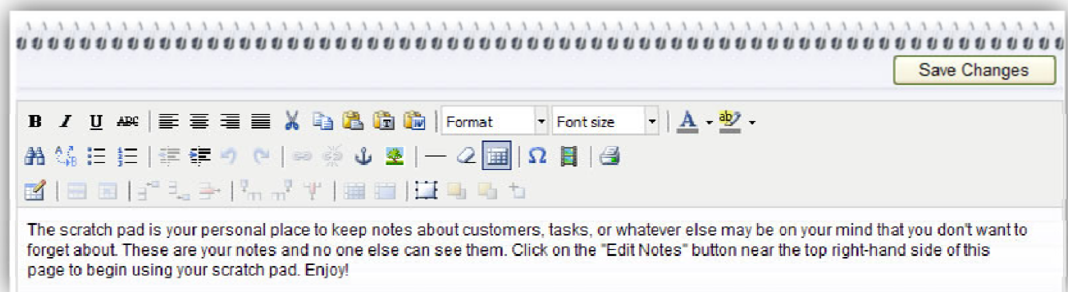
Scratch Pad

The scratch pad is a place for Toolbox users to keep personal notes. These notes are not visible to any other Toolbox users or customers.

1. Click on the **Scratch Pad** icon in the left navigation to load the scratch pad. The screen below shows what the default (read-only) view of the Scratch Pad looks like.



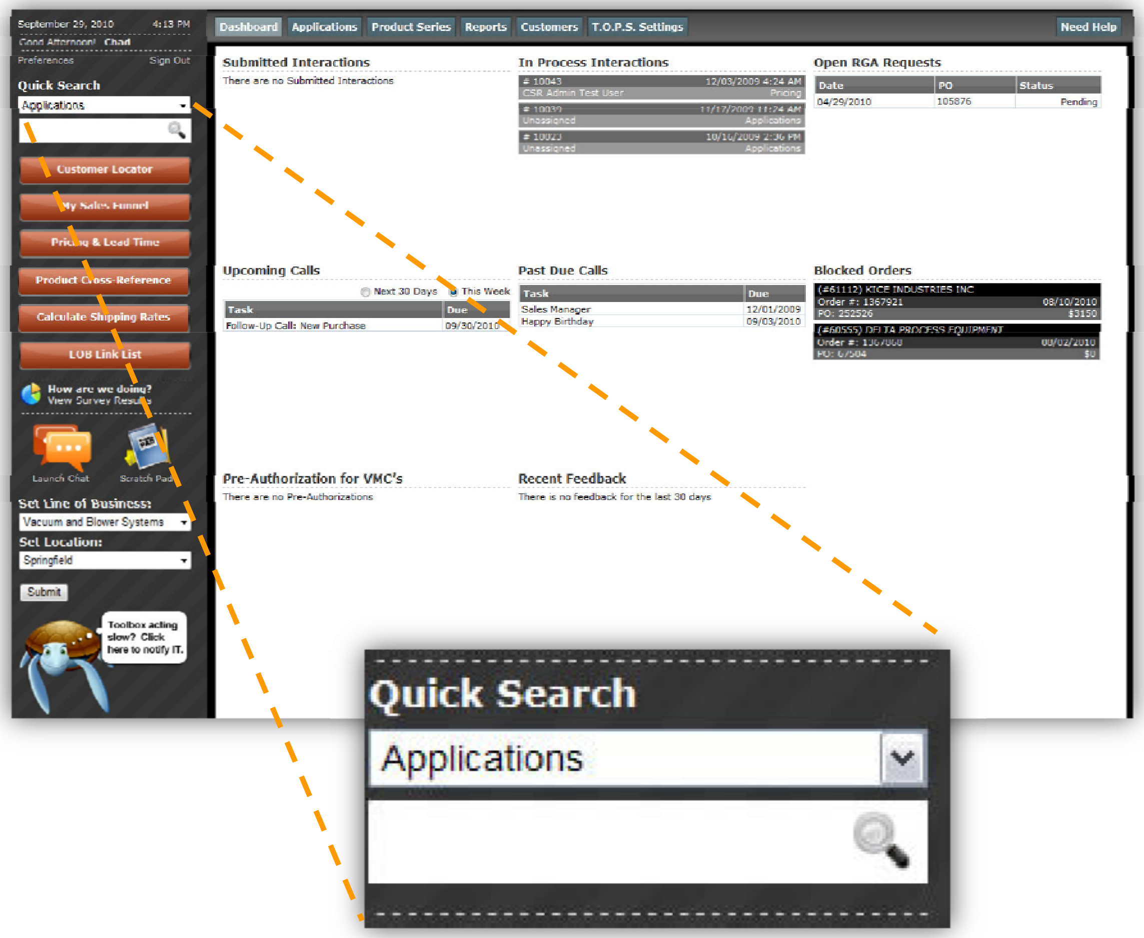
2. Click on the **Edit Notes** button to enter edit mode for your scratch pad. The screen above shows the Scratch Pad in edit mode. The editing interface closely resembles that of the editor in Microsoft® Word.



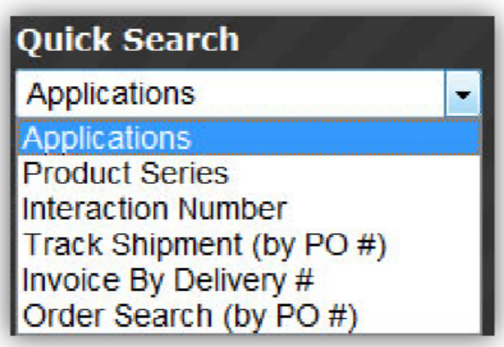
3. Click the **Save Changes** button to save any changes that you've made to your scratch pad.

Quick Search

The Quick Search functions are located on the left side of any screen in the Toolbox and allow Toolbox users to search for Applications, Product Series, Interaction Number, Track Shipment (by PO #), Invoice By Delivery #, or Order Search (by PO#).



1. Expand the Quick Search menu and select Applications, Product Series, Interaction Number, Track Shipment (by PO #), Invoice By Delivery #, or Order Search (by PO#) to start.



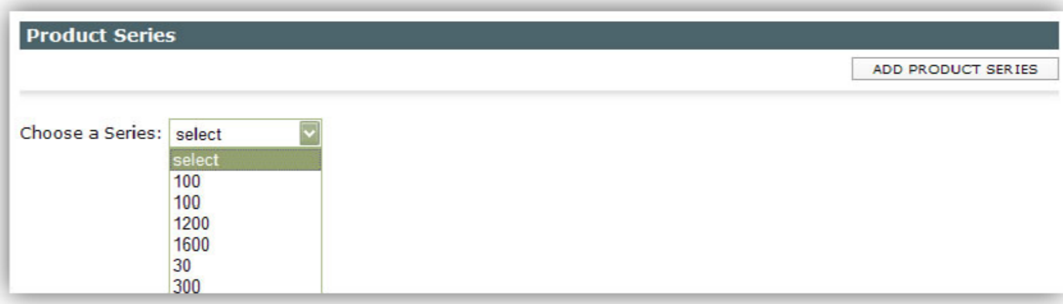
2. Enter your search criteria in the data entry box as shown below.
    a. If Applications is selected, enter an application or a key word that may be associated with that application and press Enter or click the magnifying glass to start the search.
    b. If Product Series is selected, enter a product series into the box and press Enter or click the magnifying glass to find the product series or similar product series.
    c. If Interaction Number is selected, enter the Interaction (or ticket) number that you are looking for. This number may have been given to a customer who called in earlier. You must enter the entire number.
    d. If Track Shipment (by PO #) was selected, enter the customers P.O. number to track the shipment. You must enter the P.O. as it was entered on the order.
    e. If Invoice by Delivery # is selected, enter the SAP delivery number that you are looking for. You must enter the exact delivery number.
    f. If Order Search (by PO#) is selected, enter the customer's P.O. number as it was entered in SAP. This is not case-sensitive.
3. Press your **Enter** key or click on the **magnifying glass** icon to search

Data Entry Box

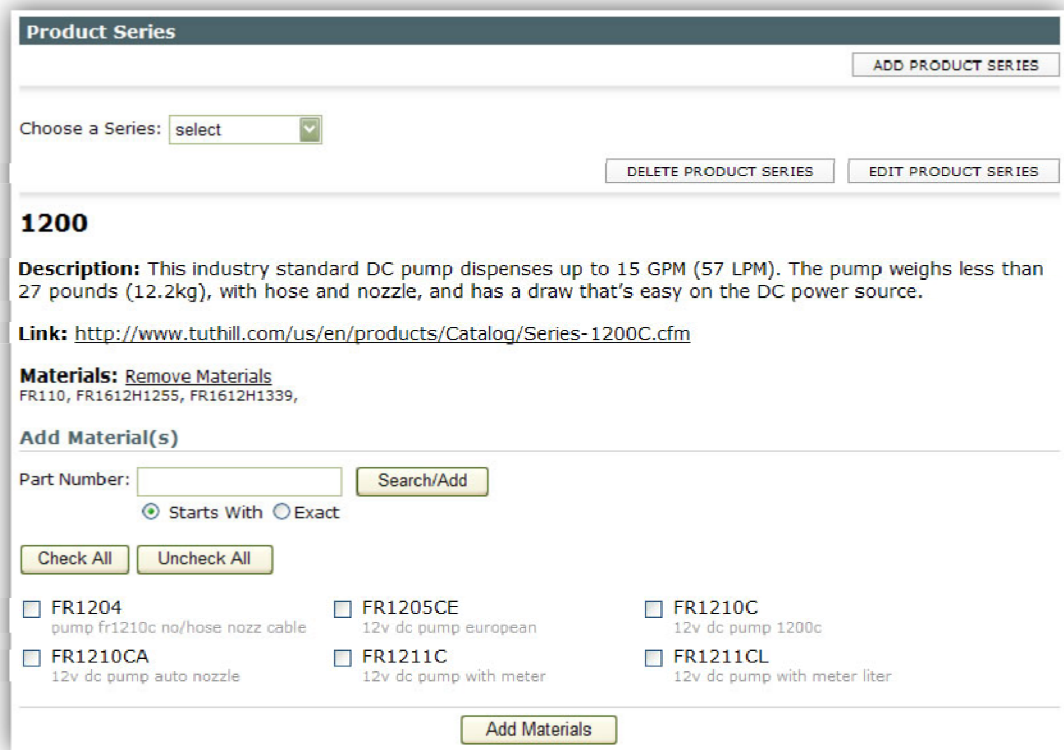
Product Series

The product series area of the Toolbox is used to store data pertaining to product series such as the series name, description, link, and part number listing. This information is visible to all Toolbox users, regardless of their LOB.

Viewing and Associating Materials



1. Click on the **Product Series** button from the main navigation menu
2. Choose a series from the list of product series as pictured above. The screen below loads.



3. Enter an exact or partial part number and click **Search/Add**
4. Check the boxes for the material(s) you'd like to associate with the selected product series

5. Click the **Add Materials** button

Editing Product Series Data

1. Click the **EDIT PRODUCT SERIES** button to edit information associated with the selected series
2. Modify any of the information you'd like for title, link, and description
3. Click **Save Changes** to save and exit edit mode for the selected series

Deleting a Product Series

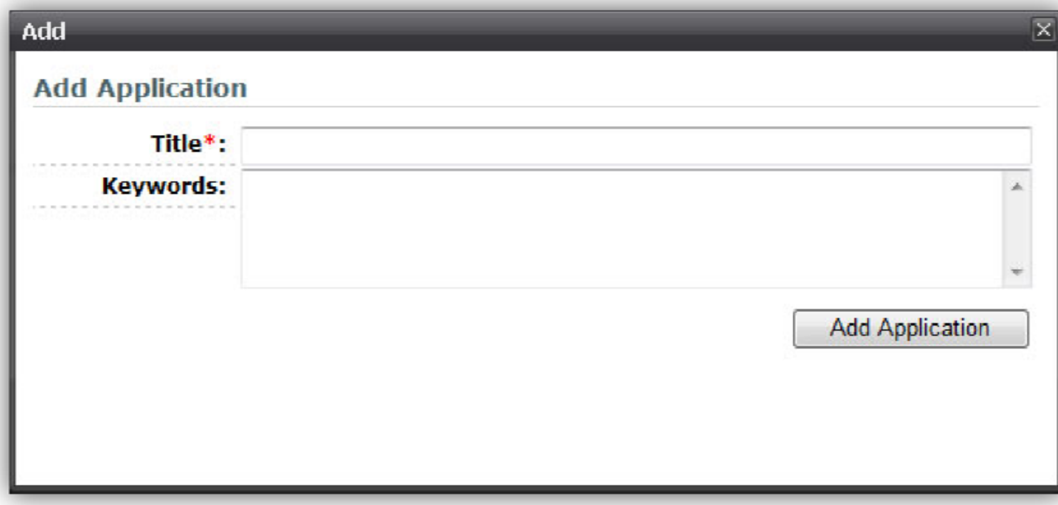
1. Click the **DELETE PRODUCT SERIES** button from within a selected series
2. If you would no longer to delete the series click on the **No, Cancel** button
3. Click **Yes, Delete** to proceed with the deletion

Applications

The applications area of the Toolbox allows LOBs to share application information (how our products are used) with one another.

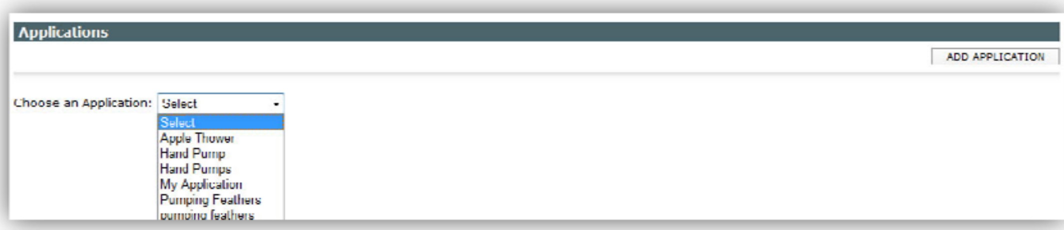
Adding an Application

1. Click the **Applications** button on the main navigation bar to access the Applications area.
2. Click the **ADD APPLICATION** button to add a new application
3. Enter the name of the application you want to add in the “Title” box (mandatory field) and keywords (optional field).
4. Click the **Add Application** button to save it

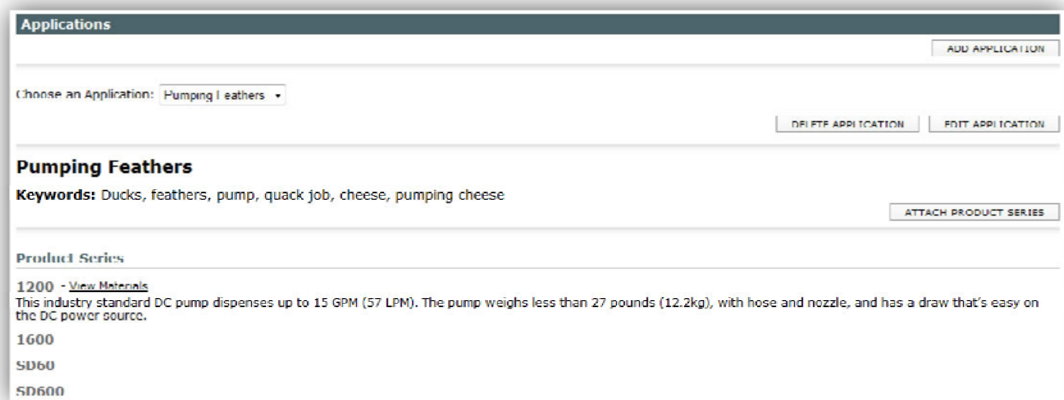


Editing an Application

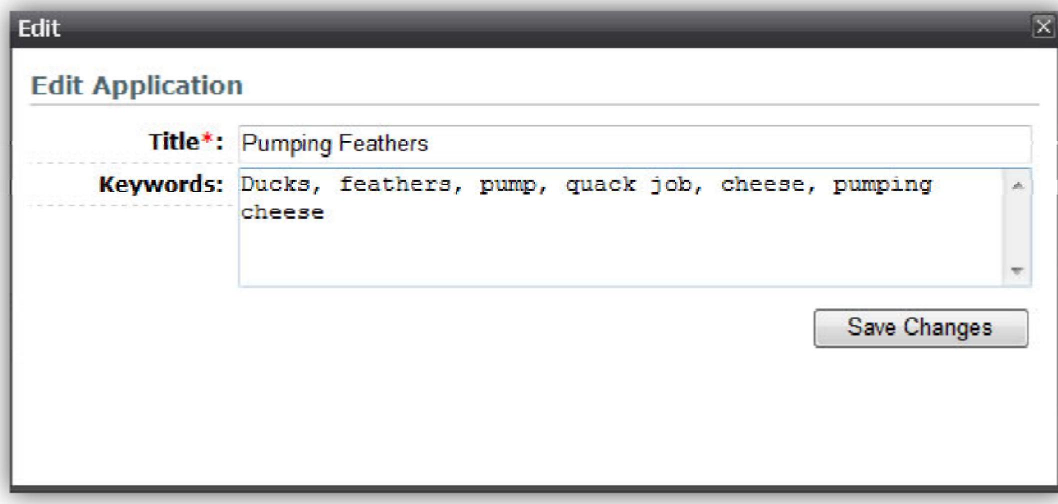
1. Click the **Applications** button on the main navigation bar to access the Applications area.



2. Select an existing application from the “Choose an Application” list as shown above. You will be able to see different product series used in this particular application as shown below.

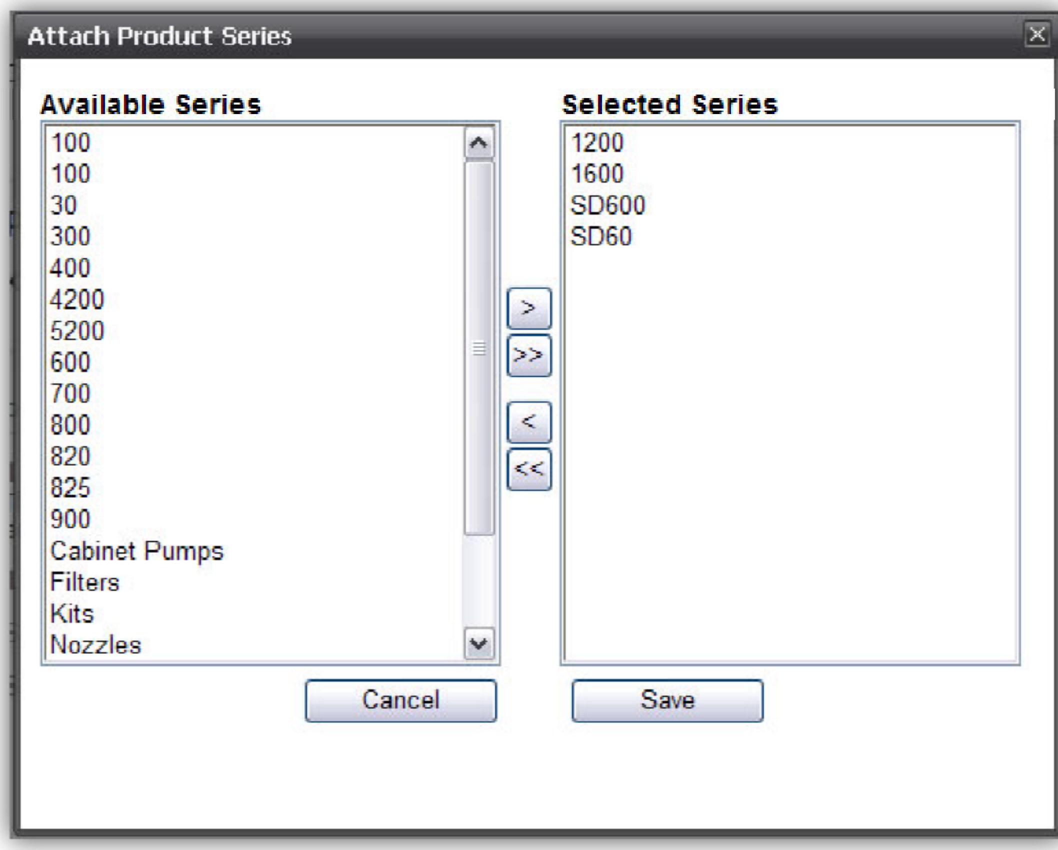


3. Click on the **EDIT APPLICATION** button to load the screen below



4. Modify any fields that you'd like to change
5. Click the **Save Changes** button

6. Click the **ATTACH PRODUCT SERIES** button to associate product series with this application as shown in the screen below.



7. Highlight the product series in the left column, click > to add it to the right column. You can also use the >> button to add all series from the left column to the right column. To remove items use the < and << buttons.
8. Click the **Save** button.

Deleting an Application

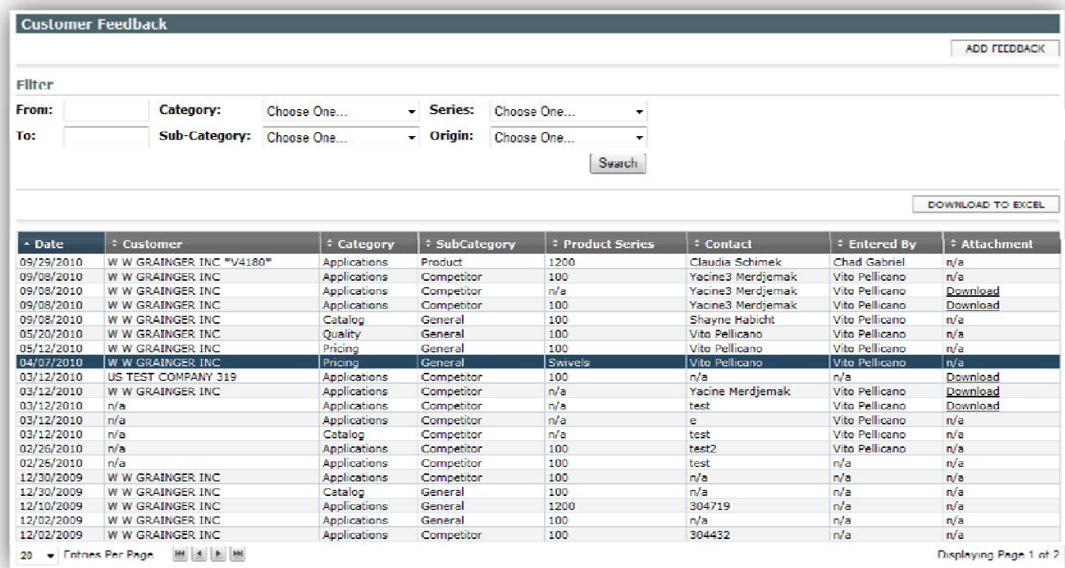
1. Click the **DELETE APPLICATION** button
2. If you would no longer to delete the application click on the **No, Cancel** button
3. Click **Yes, Delete** to proceed with the deletion

Reports – Feedback

The Customer Feedback report contains a filter for locating feedback (interactions included). The initial view of feedback contains date, customer, category, sub-category, product series, contact, entered by, and attachment All columns can be sorted in ascending/descending order by clicking on the column header. The navigation buttons at the bottom of the screen will allow you to set how many items are visible per page, go to the next page, previous page, last page, and first page. The information located at the bottom-right tells you how many pages of results there are and which page you are on.

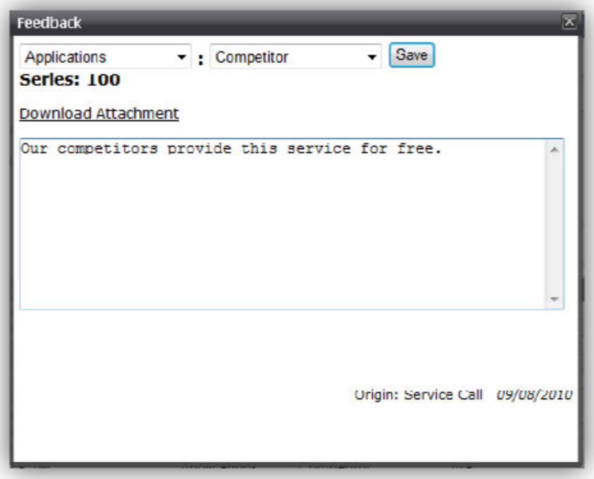
Viewing Individual Feedback Items

1. Hover your cursor over Reports on the main menu at the top of your screen and select **Feedback** from the sub-menu that appears.



Date	Customer	Category	SubCategory	Product Series	Contact	Entered By	Attachment
09/29/2010	W W GRAINGER INC *V4180*	Applications	Product	1200	Claudia Schimek	Chad Gabriel	n/a
09/08/2010	W W GRAINGER INC	Applications	Competitor	100	Yacine3 Merdjemak	Vito Pellicano	n/a
09/08/2010	W W GRAINGER INC	Applications	Competitor	n/a	Yacine3 Merdjemak	Vito Pellicano	Download
09/08/2010	W W GRAINGER INC	Applications	Competitor	100	Yacine3 Merdjemak	Vito Pellicano	Download
09/08/2010	W W GRAINGER INC	Catalog	General	100	Shayne Habicht	Vito Pellicano	n/a
05/20/2010	W W GRAINGER INC	Quality	General	100	Vito Pellicano	Vito Pellicano	n/a
05/12/2010	W W GRAINGER INC	Pricing	General	100	Vito Pellicano	Vito Pellicano	n/a
04/07/2010	W W GRAINGER INC	Pricing	General	Swivels	Vito Pellicano	Vito Pellicano	n/a
03/12/2010	US TEST COMPANY 319	Applications	Competitor	100	n/a	n/a	Download
03/12/2010	W W GRAINGER INC	Applications	Competitor	n/a	Yacine Merdjemak	Vito Pellicano	Download
03/12/2010	n/a	Applications	Competitor	n/a	test	Vito Pellicano	Download
03/12/2010	n/a	Applications	Competitor	n/a	e	Vito Pellicano	n/a
03/12/2010	n/a	Catalog	Competitor	n/a	test	Vito Pellicano	n/a
02/26/2010	n/a	Applications	Competitor	100	test2	Vito Pellicano	n/a
02/26/2010	n/a	Applications	Competitor	100	test	n/a	n/a
12/30/2009	W W GRAINGER INC	Applications	Competitor	100	n/a	n/a	n/a
12/30/2009	W W GRAINGER INC	Catalog	General	100	n/a	n/a	n/a
12/10/2009	W W GRAINGER INC	Applications	General	1200	304719	n/a	n/a
12/02/2009	W W GRAINGER INC	Applications	General	100	n/a	n/a	n/a
12/02/2009	W W GRAINGER INC	Applications	Competitor	100	304432	n/a	n/a

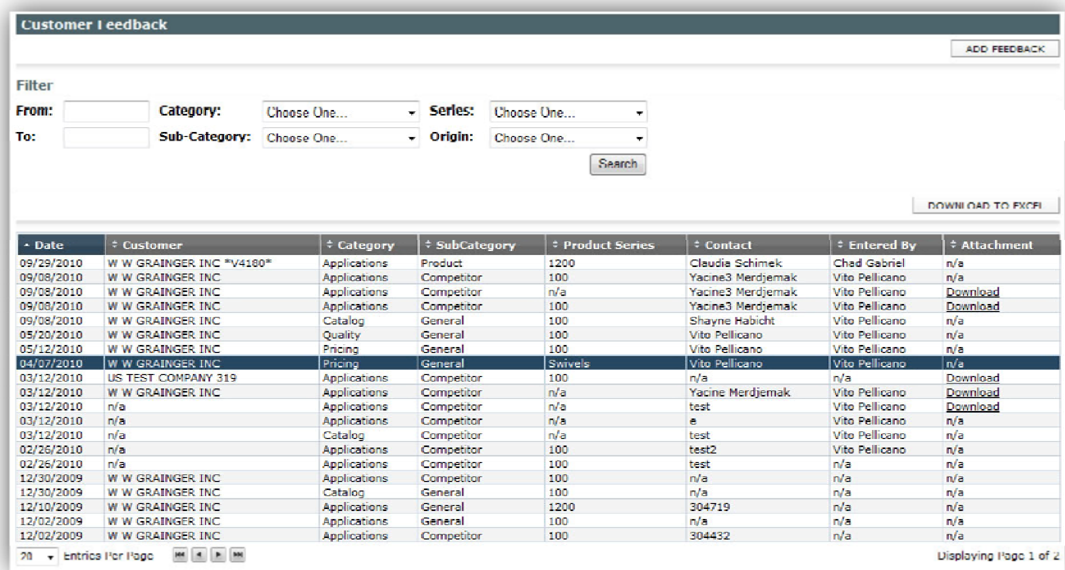
2. Click on the row containing a feedback item you want to view



3. If you'd like to edit this feedback you can do so from here. Simply make your changes and click on the **Save** button
4. Click on the **X** to close the feedback details

Filtering and Exporting Feedback for the Lake Room

1. From the Customer Feedback report main screen enter your feedback criteria such as from/to dates, category, sub-category, series, and origin as shown below



Date	Customer	Category	SubCategory	Product Series	Contact	Entered By	Attachment
09/29/2010	W W GRAINGER INC *V4180*	Applications	Product	1200	Claudia Schimek	Chad Gabriel	n/a
09/08/2010	W W GRAINGER INC	Applications	Competitor	100	Yacine3 Merdjemak	Vito Pellicano	n/a
09/08/2010	W W GRAINGER INC	Applications	Competitor	n/a	Yacine3 Merdjemak	Vito Pellicano	Download
09/08/2010	W W GRAINGER INC	Applications	Competitor	100	Yacine3 Merdjemak	Vito Pellicano	Download
09/08/2010	W W GRAINGER INC	Catalog	General	100	Shayne Habicht	Vito Pellicano	n/a
05/20/2010	W W GRAINGER INC	Quality	General	100	Vito Pellicano	Vito Pellicano	n/a
05/12/2010	W W GRAINGER INC	Pricing	General	100	Vito Pellicano	Vito Pellicano	n/a
04/07/2010	W W GRAINGER INC	Pricing	General	Swivels	Vito Pellicano	Vito Pellicano	n/a
03/12/2010	US TEST COMPANY 319	Applications	Competitor	100	n/a	n/a	Download
03/12/2010	W W GRAINGER INC	Applications	Competitor	n/a	Yacine Merdjemak	Vito Pellicano	Download
03/12/2010	n/a	Applications	Competitor	n/a	test	Vito Pellicano	Download
03/12/2010	n/a	Applications	Competitor	n/a	e	Vito Pellicano	n/a
03/12/2010	n/a	Catalog	Competitor	n/a	test	Vito Pellicano	n/a
02/26/2010	n/a	Applications	Competitor	100	test2	Vito Pellicano	n/a
02/26/2010	n/a	Applications	Competitor	100	test	n/a	n/a
12/30/2009	W W GRAINGER INC	Applications	Competitor	100	n/a	n/a	n/a
12/30/2009	W W GRAINGER INC	Catalog	General	100	n/a	n/a	n/a
12/10/2009	W W GRAINGER INC	Applications	General	1200	304719	n/a	n/a
12/02/2009	W W GRAINGER INC	Applications	General	100	n/a	n/a	n/a
12/02/2009	W W GRAINGER INC	Applications	Competitor	100	304432	n/a	n/a

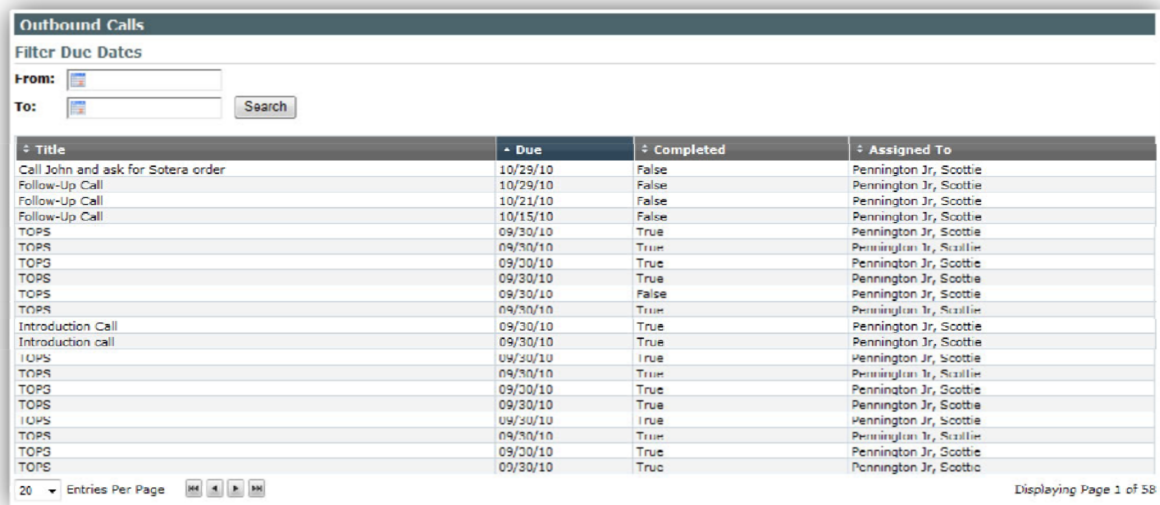
2. Click the **Search** button.
3. Click the **DOWNLOAD TO EXCEL** button to download the filtered/unfiltered information into an Excel spreadsheet

If you set all the filters back to the default settings as shown above and click the **Search** button, you will get all the feedback that is in the repository for your LOB.

You can also add feedback into the system from any feedback reporting screen by clicking the **ADD FEEDBACK** button.

Reports – Outbound Calls

The outbound calls report allows users to see a consolidated view of all outbound calls that have been scheduled. It contains a date filter and displays the title of the call, the due date, the assigned to individual, and whether or not it has been completed. All columns can be sorted by clicking on the header row. The tools at the bottom of the report allow users to specify how many entries per page are displayed and to navigate through the records if more than one page of results is found.



Outbound Calls

Filter Due Dates

From:

To: Search

Title	Due	Completed	Assigned To
Call John and ask for Sotera order	10/29/10	False	Pennington Jr, Scottie
Follow-Up Call	10/29/10	False	Pennington Jr, Scottie
Follow-Up Call	10/21/10	False	Pennington Jr, Scottie
Follow-Up Call	10/15/10	False	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	False	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
Introduction Call	09/30/10	True	Pennington Jr, Scottie
Introduction call	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie

20 Entries Per Page

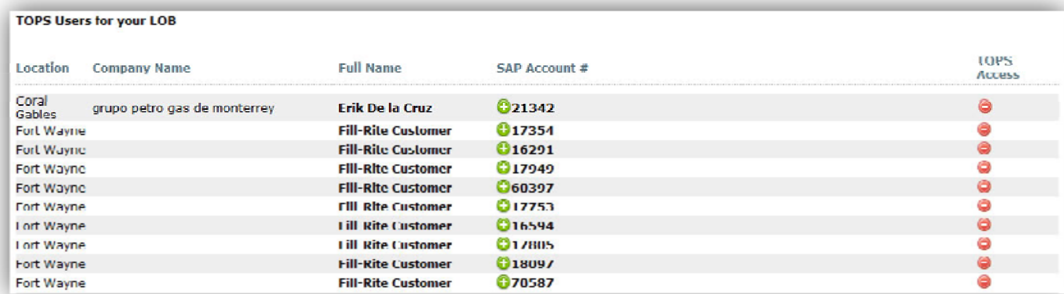
Displaying Page 1 of 58

1. Select **Reports >> Outbound Calls** from the main menu to load the report
2. Enter a date range in the From and To boxes
3. Click the **Search** button to filter the results according to the specified date range
4. Click on any row in the report to view a specific call's details

Reports – T.O.P.S. Users

The T.O.P.S. Users report shows you which VMCs have been granted access to T.O.P.S. for your LOB. It includes both master users and sub-users that the customers have added. This report shows location, company name, customer full name, and SAP Account Number. You can use this tool to associate multiple SAP account numbers to a single login. There is also a button located to the right of each user that allows you to remove access from T.O.P.S. You must have Toolbox Admin privileges to access this area.

1. Hover your cursor over the Reports menu item at the top of the screen and click on **T.O.P.S. Users** in the sub menu that appears.



TOPS Users for your LOB

Location	Company Name	Full Name	SAP Account #	TOPS Access
Coral Gables	grupo petro gas de monterrey	Erik De la Cruz	21342	
Fort Wayne		Fill-Rite Customer	17354	
Fort Wayne		Fill-Rite Customer	16291	
Fort Wayne		Fill-Rite Customer	17949	
Fort Wayne		Fill-Rite Customer	60397	
Fort Wayne		Fill-Rite Customer	17753	
Fort Wayne		Fill-Rite Customer	16594	
Fort Wayne		Fill-Rite Customer	17805	
Fort Wayne		Fill-Rite Customer	18097	
Fort Wayne		Fill-Rite Customer	70587	

2. To remove a user's access from T.O.P.S. click on the red circle with the white dash in it and confirm when prompted

Linking Multiple SAP Accounts to a Single Login

1. Locate the account that you'd like to associate another SAP account with
2. Click on the green circle with the "+" in it next to that account to load the Manage SAP Account Associations window pictured below

3. Enter a valid SAP account number in the "Enter SAP Account" field

4. If you'd like to give this account a nickname, enter it in the field labeled "Enter Nickname". Nicknames are used to assist customers in identifying which account is which within their organization. For example, if you have two accounts under one login you may wish to specify East Coast Warehouse and West Coast Warehouse. The customer will see the nickname and the account number when toggling between the two on T.O.P.S.
5. Click on the **Add** button to associate this new account to the login you've selected
6. Click on the **Done** button to close the window

Setting the Default Account

1. Locate the account that you'd like to set as the default for a customer that has multiple accounts associated with their login
2. Click on the green circle with the "+" in it next to that account to load the Manage SAP Account Associations window pictured below
3. Click the **Make Default** button
4. Click on the **Done** button to close the window

Removing a Multiple Account Association

1. Locate the account that you'd like to associate another SAP account with
2. Click on the green circle with the "+" in it next to that account to load the Manage SAP Account Associations window pictured below
3. Click the **Remove** button
4. Click on the **Done** button to close the window

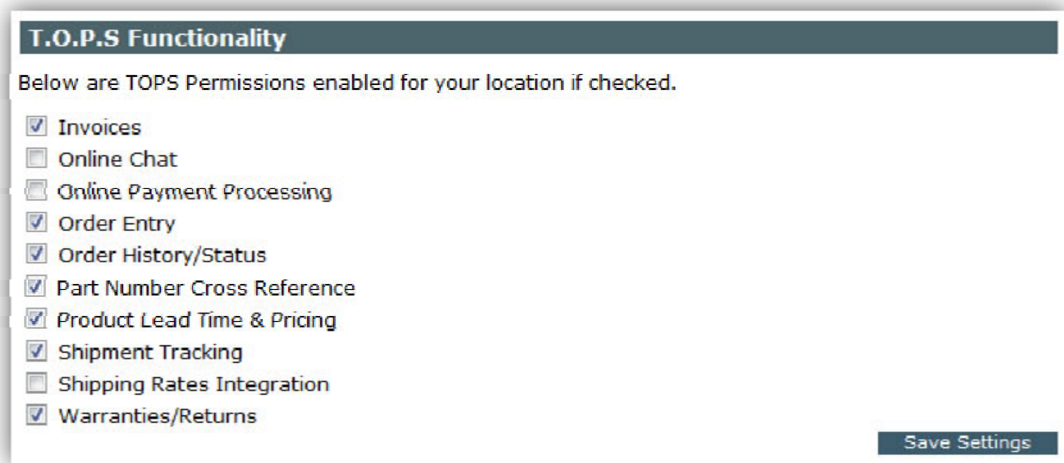
Updating a Nickname

1. Locate the account that you'd like to associate another SAP account with
2. Click on the green circle with the "+" in it next to that account to load the Manage SAP Account Associations window pictured below
3. Change the nickname to whatever you'd like it to be
4. Click the **Update Nickname** button
5. Click on the **Done** button to close the window

T.O.P.S. Settings – Permissions

The permissions area is where you can select which functions are enabled for your location's T.O.P.S. users. You must have Toolbox Admin privileges to access this area. These settings affect all T.O.P.S. users associated with your location.

1. Hover over T.O.P.S. Settings and select **Permissions** from the menu that appears
2. Review which settings are enabled/disabled for your location
3. Submit a Solution Center ticket to the "Websites" group on myTuthill to add or remove any of these functions for your location.

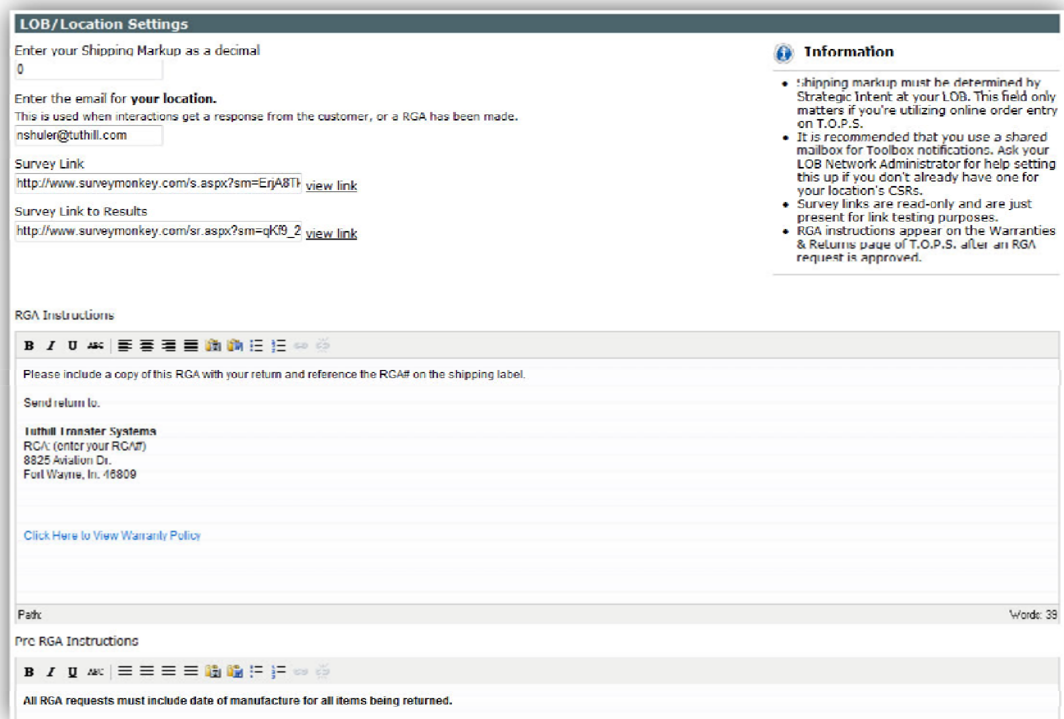


Note: The picture above is what corporate administrators see. Standard Toolbox Admins will not be able to change these directly and must submit a Solution Center ticket to the "Websites" group on myTuthill.

T.O.P.S. Settings – Configuration

The configuration portion of the T.O.P.S. Settings menu allows you to set up various configurable data elements for your location. You must have Toolbox Admin privileges to access this area.

1. Hover over the T.O.P.S. Settings menu and select **Configuration** from the sub-menu that appears
2. Adjust any settings for your Toolbox/T.O.P.S. configuration as necessary
3. Click the **Save Settings** button to save your changes. These changes will be effective immediately



If your LOB is using the shipping rates integration feature, the top field is where you will want to add the percentage of shipping freight markup. This field needs to been in decimal format.

The next field needs to have an e-mail address that will receive interactions responses and RGA requests.

The survey links are read-only and are for preview purposes only. If your survey is not linking properly on T.O.P.S. or if your survey results are not linking properly from within the Toolbox submit a solution center ticket to the “Tuthill Websites” group.

RGA Instructions - Add any RGA instructions that apply to your LOB, such as return address.

T.O.P.S. Settings – Announcements

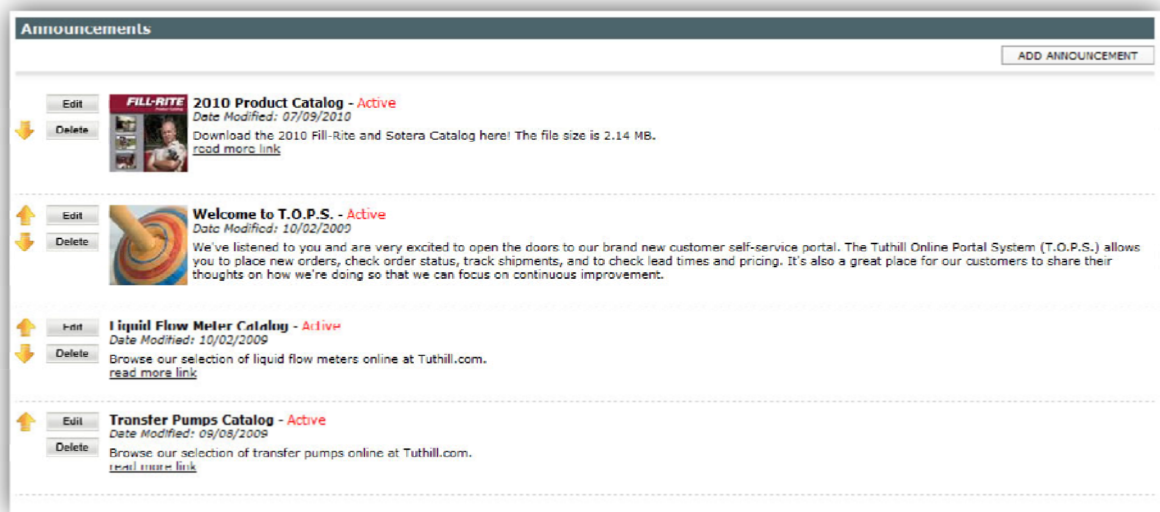
The announcements area of the Toolbox is where LOBs can manage the announcements that appear on the homepage of T.O.P.S. real-time.

Adding an Announcement

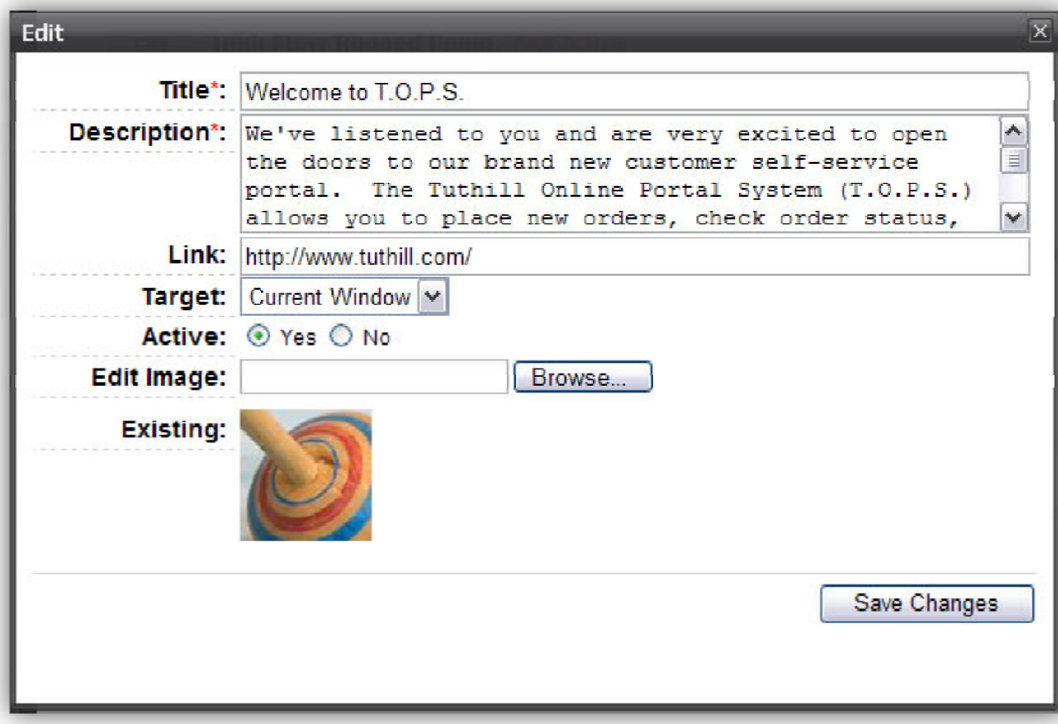
1. From any page on the site hover your cursor over the T.O.P.S. Settings menu item and click on **Announcements** in the sub-menu that appears
2. Click the **ADD ANNOUNCEMENT** button to add a new announcement
3. Enter the title, description, link, target, active (y/n), and image
4. Click the **Add Announcement** button to save it. It will only appear on T.O.P.S. if it is marked as Active

Editing an Announcement

1. From the Announcements page click on the **Edit** button located to the left of any existing announcement as shown below



2. Modify any of the fields you'd like to change as pictured below



3. Click the **Save Changes** button to save
4. Use the **up/down arrows** to change the sort order of an announcement

Deleting an Announcement

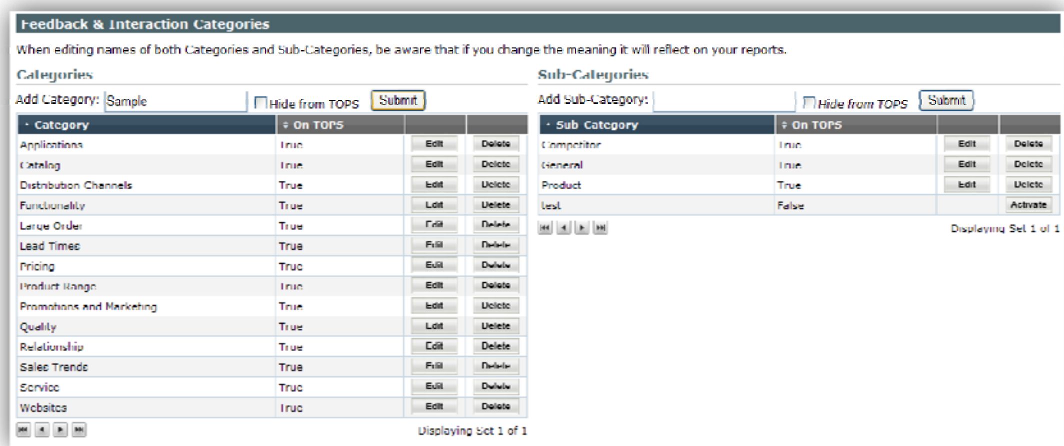
1. Click on the **Delete** button next to an announcement to remove it.
2. If you don't want to delete it anymore click on **No, Cancel**
3. Click **Yes, Delete** to proceed with deleting it

T.O.P.S. Settings – Feedback Categories

The feedback categories tool allows Toolbox users to manage the categories and sub-categories to be displayed throughout T.O.P.S. and the Toolbox. Before modifying any of these values please consult with your LOB SI team and refer to the Standard Work on Bamville for spontaneous feedback.

Adding Categories and Sub-Categories

1. Hover over the T.O.P.S. Setting main menu item and select **Feedback Categories** from the sub-menu that appears.
2. Enter a category or sub-category that you'd like to add
3. If you want to hide this category from T.O.P.S. users (show for Toolbox users only) check the "Hide from TOPS" box.
4. Click **Submit** to add the new category or sub-category



Editing Feedback Categories and Sub-Categories

1. Click the **Edit** button located next to the category or sub-category that you'd like to edit
2. Change the name of the category and/or toggle the "Hide from TOPS" checkbox
3. Click the **Submit** button to save your changes

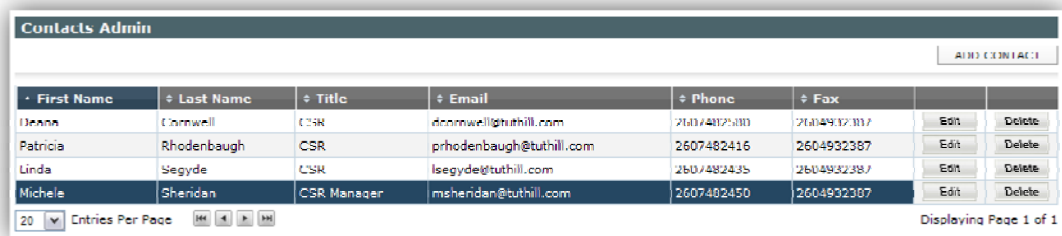
Deleting Feedback Categories and Sub-Categories

1. Click the Delete button next to any category or sub-category that you'd like to delete.
2. If you no longer want to delete it click on **No, Cancel**
3. Click on **Yes, Delete** to confirm deletion. Once deleted, the category can be re-activated by clicking on the **Activate** button that is now in place of the Delete button.

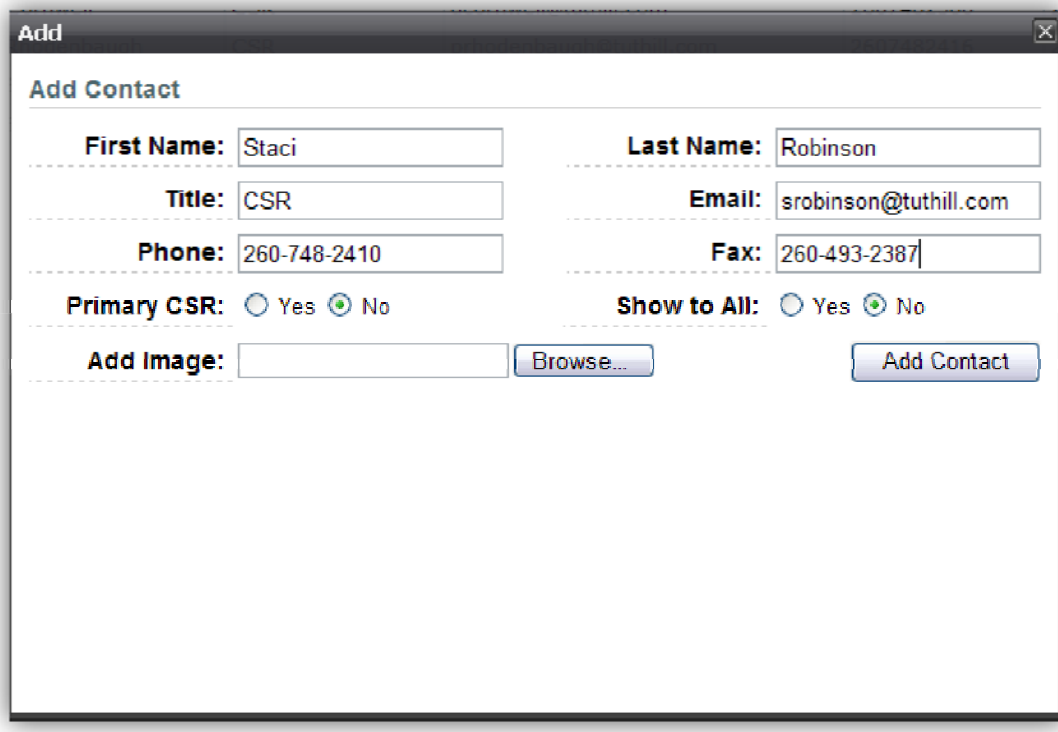
T.O.P.S. Settings – Tuthill Contacts

Tuthill Contacts represent the pool of CSRs, salespeople, etc. that you'd like to make available as potential contacts for T.O.P.S. users.

1. Hover over T.O.P.S. Settings and select **Tuthill Contacts** from the sub-menu that appears



2. Click **ADD CONTACT** to add a new contact
3. Complete all fields required to add a new contact as shown below



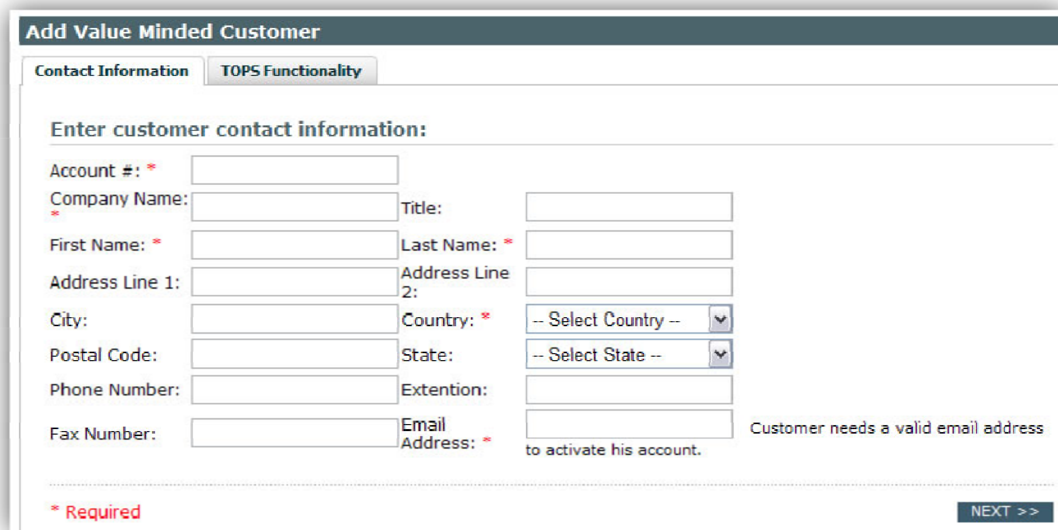
4. Click **Add Contact** to save

To Edit or delete the contact just click the **Edit** or **Delete** buttons.

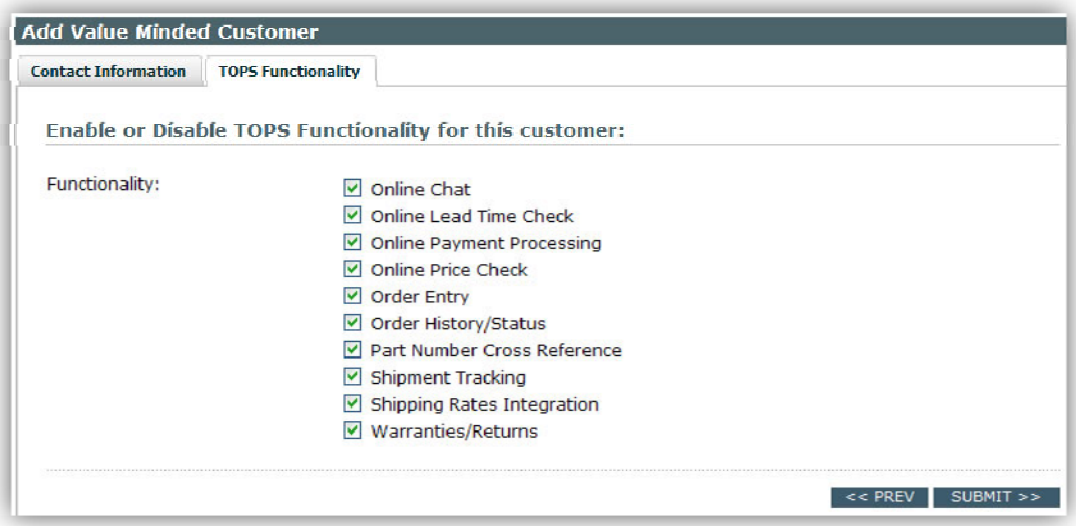
Customers - Add VMC

The Add VMC tool is how Toolbox users (Admins Only) can grant users access to T.O.P.S.

1. Hover over the Customers menu item in the main menu and click on **Add VMC**

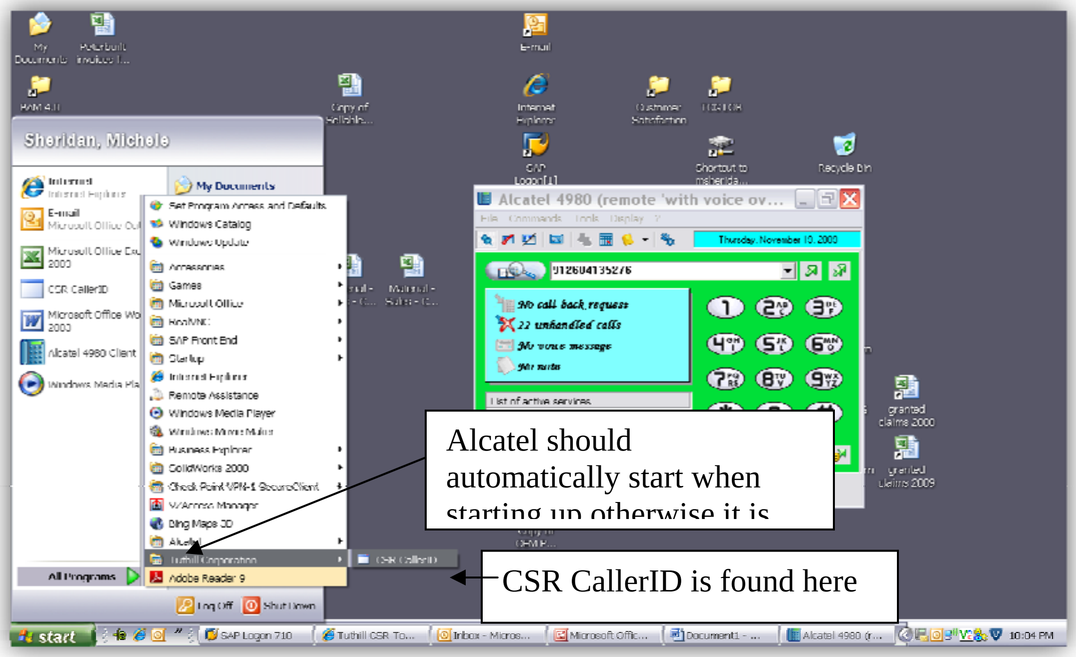


2. Enter the customer's SAP account number in the Account # field
3. Click in the First Name field and wait for SAP to autopopulate most of the fields
4. Enter the user's first name, last name, and e-mail address (all required)
5. Click on **Next**
6. Check the boxes to select the functionality that you'd like to enable for this specific user
7. Click **SUBMIT** to proceed to the confirmation page
8. Click on the blue welcome letter button to load the welcome letter template
9. Modify the letter and send it to the customer



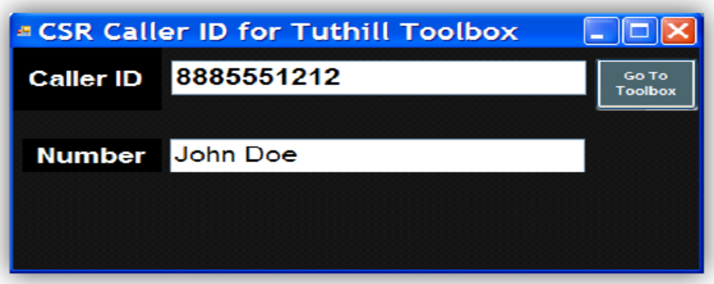
Screen-Popping

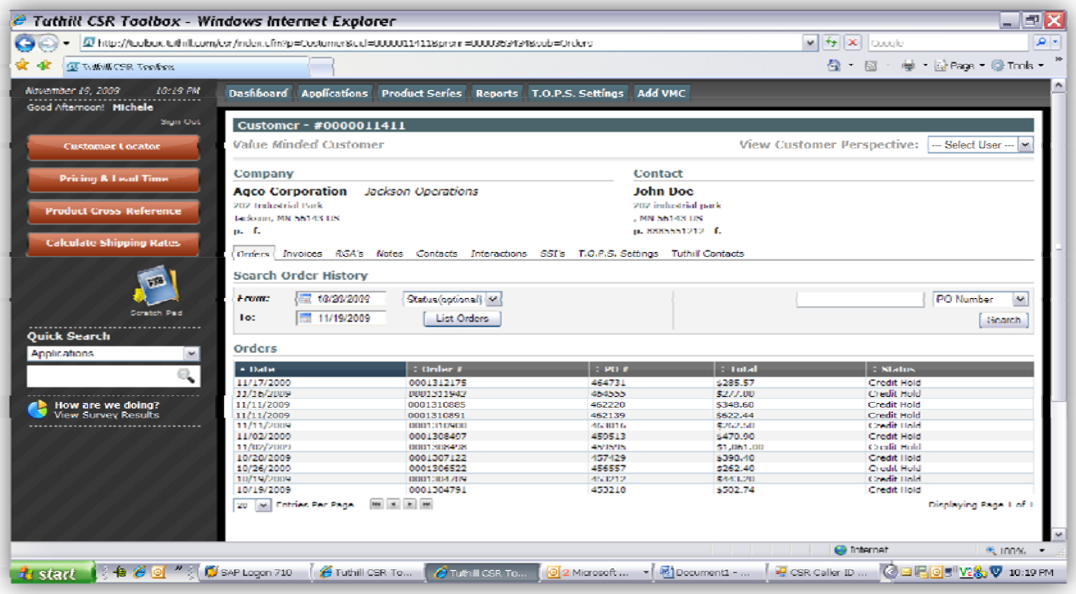
You must have an Alcatel 4980 Soft Phone AND the CSR CallerID installed in order for screen-popping to work.



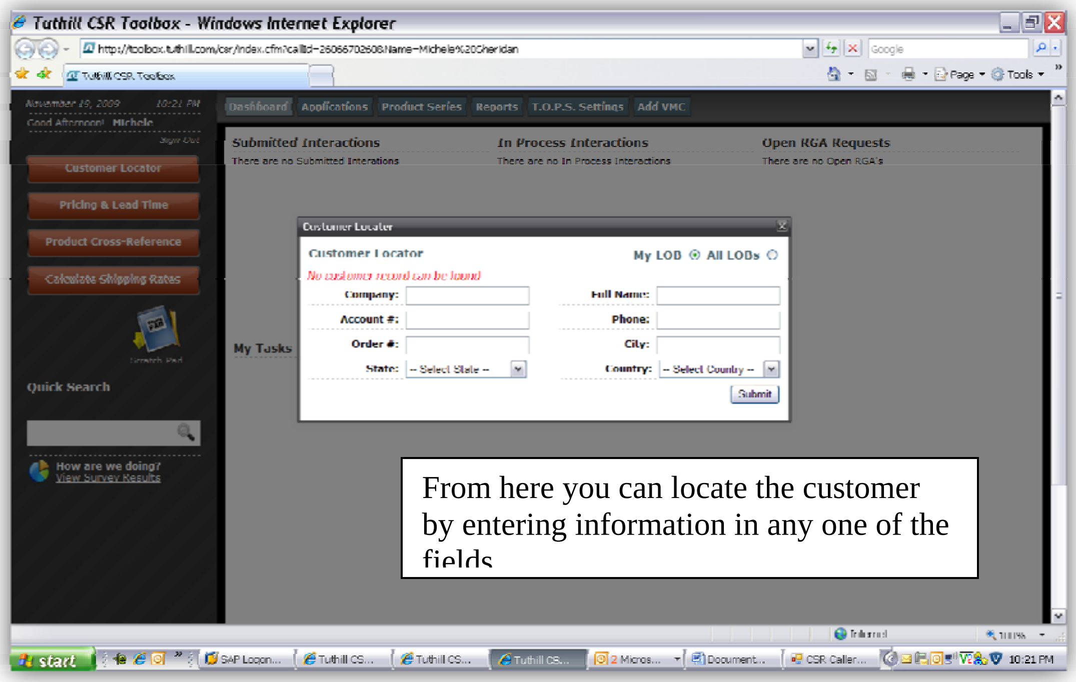
If you have just installed the CSR Caller ID, you must restart the program in order for it to work correctly.

When a call comes in, the CSR Caller ID will pop up. Click on **Go To Toolbox**. If the number is recorded in a contact attached to a customer master, you will be directed to that customer's "Orders" tab.





If the phone number is not found in the Toolbox, the Customer Locator tool loads
Ask clarifying questions to identify the customer
Enter new search criteria
Click on the **Submit** button



After finding the account the customer is associated with, the Add Contact screen pops up.

Enter customer contact information for all required fields. The phone number the customer is calling from will be pre-populated in the “Phone” field. Remember the more phone numbers we enter the more likely it will be to pop next time they call.
Click **Add Contact** to save this new contact information to the Toolbox and SAP