Hy Sales Funne) Pricing & Lead Time	P. 603-840 STA VS. Actual Report TTD Plan VS. Actual Report Request Scoresard Orders Invoices RGA's Note	asl	outhound Calls		
	Request Scorecalo				
Pricing & Lead Time		- Contacts: Interactions Day	GS Future		PO Number
	autors Invoices RGA's Note	s Contost			Search
	Orders				
Product Cross-Reference	Search Order History	10 Status(optional) ·			
Product Cross	Cohruary 1, 20.	10			
1 - Dates	From: September 28,	2010 List Orders			÷ Status
Calculate Shipping Rates	To: September 20.			a Total	Complete
				\$984.00	Confirmed
LOB Link List			÷ 90 #	\$300.00	Complete
LOB LINK COM	Orders	+ Order #	4500014691	\$2,934.00	Confirmed
	Date Entered	0001366027	4500014684	00.05	Confirmed
How are we doing?	- Date Emerce	0001365374	4500014512	\$962,700.00	Complete
How are we Results	05/27/2010	0001363326	WARRANTY	\$750.00	Complete
VIEN	05/26/2010	0052008501	4500014195	\$7.500.00	Confirmed
	05/19/2010	0001358868	A500014012	\$962,700.00	Complete
	05/06/2010	0001355279	4500013984	\$25.00	Complete
	05/04/2010	0001355292	4500013835	\$745,60	Complete
	04/22/2010	0001354008	4500013814	\$962,700.00	Complete
Scretch Pad	24/22/2010	0001352534	4500013748	\$95.00	Confirmed
Launch Chat Scretch Fun	04/19/2010	0001351579	4500012724	00.00	Complete
	04/14/2010	0001343855	4500013040	#962,700.00	Complete
BUSINCSSI					
bet i me or but	ad/12/2010	0001040282	+500013030	+2 949.40	Complete
Set Line of Business:	04/12/2010	0001342282	4500013030	\$2,849,40	Complete partially Shipped
Vacuum and Blower Systems	04/12/2010 03/16/2010	0001342282	4500013030 4500012934	\$2,849,40	Partially Shipped
Vacuum and Blower Systems	04/12/2010 03/16/2010 03/10/2010	0001342282 0052008450 0003341732	4500013030 4500012934 4500012952	\$2,849.40 \$135.00 \$962,700.00	Complete
Vacuum and Blower Systems Set Location:	04/12/2010 03/16/2010 03/10/2010 03/09/2010	0001342282 0052008450 0001341732 0001341326	4500013030 4500012934 4500012952 4500012799	\$2,849.40 \$135.00 \$962,700.00 \$900	Partially Shipped Complete Complete
Vacuum and Blower Systems Set Location:	04/12/2010 03/16/2010 03/10/2010 03/09/2010 03/09/2010	0001342282 0052008450 0001341732 0001341326 00013339623	4500013030 4500012934 4500012952 4500012799	\$2,849.40 \$135.00 \$962,700.00 \$0.00 \$117.00	Partially Shipped Complete Complete
Vacuum and Blower Systems	04/12/2010 03/16/2010 03/30/2010 03/09/2010 03/09/2010 03/09/2010	0001342282 0052008450 0003341732 0001341326 0001339823 0001339823	4500013030 4500012934 4500012952 4500012759 450001216 550 ACEMENT COVER	\$2,849.40 \$135.00 \$962,700.00 \$900	Complete
Vacuum and Blower System Set Location: Springfield	04/12/2010 03/16/2010 03/0/2010 03/09/2010 03/09/2010 03/08/2010 03/08/2010	0001342282 0052008450 0001341732 0001341736 0001339823 0001339823 0001339429	450013030 450012934 450012552 450012799 4500013116 REPLACEMENT COVER 450012808	\$2,849.40 \$135.00 \$962,700.00 \$0.00 \$117.00	Partially Shipped Complete Complete
Vacuum and Blower System Set Location: Springfield	04/12/2010 03/16/2010 03/09/2010 03/09/2010 03/09/2010 03/08/2010 03/03/2010 03/03/2010	0001342282 0052008450 0001341732 0001341326 0001339833 0001339839 0001339439 0001339429	4500013030 4500012934 4500012952 4500012759 450001216 550 ACEMENT COVER	\$2,849.40 \$135.00 \$962,700.00 \$0.00 \$117.00	Partially Shipped Complete Complete
Vacuum and Blower System Set Location: Springfield Submit	04/12/2010 03/15/2010 03/15/2010 03/09/2010 03/09/2010 03/09/2010 03/02/2010 03/02/2010 02/25/2010	0001342282 0052008450 0001341732 0001341326 0001339833 0001339839 0001339439 0001339429	450013030 450012934 450012552 450012799 4500013116 REPLACEMENT COVER 450012808	\$2,849.40 \$135.00 \$962,700.00 \$0.00 \$117.00	Partially Shipped Complete Complete
Vacuum and Blower System Set Location: Springfield Submit	04/12/2010 03/14/2010 03/04/2010 03/09/2010 03/09/2010 03/09/2010 03/02/2010 03/02/2010 03/02/2010 03/225/2010 03/225/2010	0001342282 0052008450 0001341732 0001341326 0001339833 0001339439 0001339429 0001339429 000133726	450013030 450012934 450012552 450012799 4500013116 REPLACEMENT COVER 450012808	\$2,849.40 \$135.00 \$962,700.00 \$0.00 \$117.00	Partially Shipped Complete Complete
Vacuum and Blower System Set Location: Springfield Submit	04/12/2010 03/14/2010 03/04/2010 03/09/2010 03/09/2010 03/09/2010 03/02/2010 03/02/2010 03/02/2010 03/225/2010 03/225/2010	0001342282 0052008450 0001341732 0001341326 0001339833 0001339439 0001339429 0001339429 000133726	450013030 450012934 450012552 450012799 4500013116 REPLACEMENT COVER 450012808	\$2,849.40 \$135.00 \$962,700.00 \$0.00 \$117.00	Partially Shipped Complete Complete
Vacuum and Blower System Set Location: Springfield	04/12/2010 03/15/2010 03/15/2010 03/09/2010 03/09/2010 03/09/2010 03/02/2010 03/02/2010 02/25/2010	0001342282 0052008450 0001341732 0001341326 0001339833 0001339439 0001339429 0001339429 000133726	450013030 450012934 450012552 450012799 4500013116 REPLACEMENT COVER 450012808	\$2,849.40 \$135.00 \$962,700.00 \$0.00 \$117.00	Partially Shipped Complete Complete

Toolbox Handbook

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

Last Modified September 30th, 2010

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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.

Tuthill.com L	ogin Screen
1	Tuthill
_	our email address and password:
Email Addres	is:
Password:	
	Forgot your password? Click Here
	ОК

- 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.

T uthill			Tuthill brin	Home Si r a Distributor? gs customers and products together.	<u> </u>	stomer? Start here Contact Us angle" Custom Scarch Search
	Markets B	rands	About Tuthill)	News	Careers	Español
Home / Sign-On	Forgot My	Passwor	d			
Activate My Account Forgot My Password Register My Account Why Register for a Tuthill.com Account Helpful Links	2	2				
Download Product Specifications Looking for a Distributor? Browse Product Catalog		Please er	nter the email ad	ldress you used t	to register yo	our account:
				Submit		

- 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

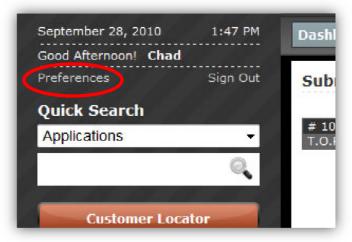
This group is reserved for individuals that manage customer credit. It includes basic Toolbox group functionality. Toolbox Credit group members can generate D&B credit scorecards and view credit history.



Preferences

Users can set a preference for which tab of a customer view that the <u>customer locator</u> 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.

Preferences	
Preferences	
Customer Default Tab:	Orders -
	Save Preferences

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

Food Afternoon! Chad Preferences	Sign Out	Submitted Interacti	ions	In Process Interactions		Open RGA Requests
Duick Search			an interaction to assign location.	# 10057	05/20/2010 1:20 PM	There are no Open RGA's
Applications	-	# 10054 T.O.P.S.	04/07/2010 9:16 AM Pricina	Vito Pellicano # 10052	Quality 12/30/2009 10:43 AM E	
	0	11011-01	in any	Vito Pellicano	Applications	
	~			# 10051 Chad Gabriel	12/30/2009 10:14 AM Catalog	
Customer Loc	sator		E	J 10047 Vito Pellicano	12/10/2009 2:15 PM Applications	
				# 10042	12/02/2009 8:27 AM	
My Sales Fur	nnel			Unessigned # 10041	Applications 12/02/2009 0:21 AM	
Pricing & Lead	Time			Unassigned ± 100-10	Applications 11/23/2009 9:23 //M	
		Upcoming Calls	-	Past Due Calls	11/20/2009 9(2) AM	Blocked Orders
Product Cross-Re	eference	there are no calls due	(1) Next 30 Days 🌘 This Week		Due	(#17766) GASOLINE FOULPMENT SERVICE - FTW
LOB Link L	-		Cherron polo	Sales Manager	12/01/2009	Order #: 1368010 09/08/201 PO: Test Whit is going on \$907.2
TOBTINET	151			Happy Birthday	09/03/2010	(#17736) GAEOLINE EQUIPMENT SERVICE FIW
👍 llow are we do						Order #: 1368011 00/08/201 PO: Test Again \$1289.7
View Survey Re	<u>sults</u>					(#17736) GAGOLINE EQUIPMENT SERVICE - ITW Order #: 1360012 09/00/201
	1					PO: Test 3 for what is q \$967.2
						(#17736) CASOLINE EQUIPMENT SERVICE FTW Order #: 1368013 09/08/201
Launch Chat Si	cratch Pad					PO: Lesi4 S15547.9 (#17736) GASOLINE FOURPMENT SERVICE - FTW
et Line of Busin	e.s.s:	* ** ***				Order #: 1358015 09/08/201
Transfer Systems	-	Pre-Authorization f		Recent Feedback	Click a feedback to view.	
et Location:	13-13-14	Company W. W. Grander, Inc.	Status Requested	Yacine3 Merdjemak	09/08/2010 10:15 AM	
Fort Wayne	-		- Add nesreu	Applications Yacine3 Merdiemak	Competitor 09/00/2010 10:13 AM	
Submit				Applications	Competitor	
				Yacine3 Merdjemak Applications	09/08/2010 10:00 AM Competitor	
slow	box acting /? Click			Shayne Habicht Cataluu	00/08/2010 0:50 AM General	
here	to notify IT.			Catalog	General	
	11 11 1					

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

Customer Loca	tor		My L	OB All LOBs
Company:			Full Name:	
Account #:			Phone:	
Order #:			PO #:	
Cust. Part #:			City:	
State:	- Select State -	Ŧ	Country:	Select Country •

- 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.



	omer Locator			My LO	B 🖲 All LOBS	; (
	Company:		Ful	Name:		
	Account #:			Phone:		
	Order #:			PO #:		
с	ust. Part #:		7	City:		
	State: - Select Sta	te	Go to: Orders	Country:	Select Country	mit
Show	: Sold To Customers	- Filter				
	City	State	Company	Name2	Account #	
Z001	Frederick 0000065903	MD	Bp Solar		0000065903	
Z001	Changzhou City, Jiangsu Province 0000090578		Changzhou Trina Solar Engergy Co.lt	Electronics Park New District	0000090578	
	Hazelwood 0000405174	MO	Confluence Solar		0000405174	
Z001	Merrimack 0000069495	NH	Gt Solar		0000069495	1
	Wuxi, Jiangsu 0000400532		Konca Solar Cell (Wuxi) Co. Ltd		0000400532	
7001	Hinkley 0000069144	CA	Luz Solar Part Pho	ne: 603-883-5	200	
LOOT	Carson 0000062519	CA	Sanyo Solar (
	Souderton 0000068760	PA	Solar Atmospheres Inc.		0000068760	
Z001	Souderton boobboos/ou		Solar Power		0000085387	
Z001 Z001	Belle Vernon 0000085387	PA	Industries United Solar			

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 <u>preferences</u>.



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
- 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)

Customer - #00000	69495					
alue Minded Custor	ner					
Company						
L Solar						
43 Daniel Webster Highway	, ,					
errimack, NH 03054 US						
603-883-5200 f. 603-59	5-6993					
YID Plan VS. Actual Rep	oru					
Request Scorecard						
Orders Invoices RGA's	Notes Contacts Interactions	BS/GS Funnel	Outbound Calls			
earch Order Ilistory						
From: 👘 February	1, 2010 Status(optional)	-				PO Number
To: 📑 Septembe	r 28, 2010 List Order					Search
						(orditeri
rders						
- Dale Enlered	≑ Order #	≑ PO #		* Tulal	* Slalus	
5/27/2010	0001365027	450001469	1	\$984.00	Complete	
5/26/2010	0001365374	450001468		\$300.00	Confirmed	
5/19/2010	0004363326	450001451		\$2,904.00	Complete	
5/06/2010	0052000501	WARRANT		\$0.00	Confirmed	
5/04/2010	0001358868	450001419		\$962,700.00	Confirmed	
04/22/2010	0001355279	450001401		\$750.00	Complete	
	0001355202	450001308				

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

Indua N	Ainded Cu	ot o ma o m										
value M	ainded Cu	Istomer										
Compa	ny											
Gt Sola	r											
243 Danie	el Webster Hi	ighway										
	k, NH 03054											
. 603-08	13-5200 t. 6	00-595-6993										
M YTD P	an VS. Actu	al Report										
Keque	ast Scorecard	1										
Orders	Invoices I	RGA's Notes	Contacts	Interactions	BS/GS	Funnel	Outhound Calls					
												VIEW ORDERS
View (Order Confi	rmation										
PO Numi	ber: 45000										On	ler Status: Comple
PO Numi	ber: 45000 ils:		Des	cription				Item Price	Currency	0Ev		-
PO Numi Commen Item #	ber: 45000 Ils: Part # 00000000	014512		cription GFAL.MECHAN			W/0F-11	Item Price \$2.709.00	Currency USD	Qty	On Delv. Qty 10	Sched. Ship Da
Ω Numi Commen Item ≠ 000010	ber: 45000 Ils: Part # 00000000 Customer 00000000	014512 0000040019 part #: 0/a 0000040019								_	Deiv. Qty	Sched. Ship D: 05/21/201
PO Numi Commen Item # 000010 000010	ber: 45000 lls: Part # 00000000 Customer 00000000 Customer 00000000	0000000019 part 4: 10/4 0000040019 part 4: 10/4 0000011745	**~	GEAL MECHAN	ICAL WIT			\$2,709.00	115.0	10	Delv. Qty 10	Sched, Ship Da 05/21/201 05/27/201
20 Numl Commen Item # 000010 000010 000020	ber: 45000 lb: Part # 00000000 Castomer 00000000 Castomer 00000000 Castomer 00000000	0000000019 part 4: n/a 0000040019 part 4: n/a	**~ SFA	SEAL, MECHAN	ICAL WIT			\$2,709.00 \$2,709.00	USD USD	10 10	Delv. Qty 10 0	Sched. Ship Da 05/21/201 05/27/201 05/27/201
20 Numi Commen Item # 000010 000010 000020	her: 45000 lb: Part # 00000000 Customer 00000000 Customer 00000000 Customer 00000000 Customer	014512 part #: n/a 0000040019 part #: n/a 00000011/45 part #: n/a 00000011/45	**~ SFA	SEAL, MECHAN SEAL, MECHAN	ICAL WIT			\$2,709.00 \$2,709.00 \$225.00	USD USD USD	10 10 10	Delv. Qty 10 0 10	ler Status: Comple Sched, Ship Da 05/27/201 05/27/201 05/27/201
PO Numi Commen Item # 000010 000010 000020	her: 45000 lb: Part # 00000000 Customer 00000000 Customer 00000000 Customer 00000000 Customer	00000000000 part #: 0/a 00000040019 part #: 0/a 0000001145 part #: 0/a 000001145 part #: 0/a	**~ SFA SEA	SEAL, MECHAN SEAL, MECHAN	ICAL WIT			\$2,709.00 \$2,709.00 \$225.00	USD USD USD USD	10 10 10	Delv. Qty 10 0 10	Sched. Ship Da 05/21/201 05/27/201 05/27/201

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.

	Second Second						
Value Minded Custo	mer						
Company							
Gt Solar							
243 Daniel Webster Highwa	ау						
Morrimack, NH 03054 US							
p. 603-003-5200 t. 603-5	195-6993						
YTD Plan VS. Actual Re	and a						
_							
Request Scorecard							
			www.fetca.coff.fetca.com	i stalla			
	s Notes Conta	cts Interactions F	IS/GS Funnel Outhound	I cialls			
Orders Invoices RGA		tts Interactions H	IS/GS Funnel Outhound ÷ Delivery ≠	i Calls ∓ PO ≠	÷ Order #	÷ Total	÷ Due Date
Orders Invoices RGA	s Notes Conta	1			÷ Order # 1330430	÷ Total \$170,754.10	÷ Due Date 07/03/2010
Orders Invoices RGA + Date Created 06/03/2010	s Notes Conta + Status	÷ Invoice #	÷ Delivery #	÷ PO #		and the second sec	
Urriers Invoices RGA' + Date Created 06/02/2010 06/02/2010 06/01/2010	S Notes Conta Status LATE LATE LATE	+ Involce # 91915940 91915592 91915243	+ Delivery # 82337875	÷ PO # 4500013116	1339439	\$179,754.10	07/03/2010 07/02/2010 07/01/2010
Urriers Invoices RGA' + Date Created 06/02/2010 06/02/2010 06/01/2010	s Notes Conta + Status LATE LATE	÷ Involce # 01015940 91915592	÷ Delivery # 82337875 82337221	+ PO # 4500013116 4500012378	1330430 1334505	\$179,754.10 \$15,000.00	07/03/2010 07/02/2010
Orders Invoices RGA + Date Created 06/03/2010 06/02/2010 06/01/2010 06/01/2010	S Notes Conta Status LATE LATE LATE	+ Involce # 91915940 91915592 91915243	Delivery # 82337875 82337221 82336441	<pre></pre>	1330430 1334505 1366027	\$179,754.10 \$15,000.00 \$1,000.95	07/03/2010 07/02/2010 07/01/2010
LICOUCST Ecorecard (Inters Invoices NIGA) • Date Created • 6/03/2010 • 66/02/2010 • 66/02/2010 • 65/23/2010 • 65/23/2010 • 65/27/2010 • 65/27/2010	S Notes Conta Status LATE LATE LATE LATE	÷ Involce # 91915940 91915592 91915243 11714754	Delivery # 82337875 82337221 82336441 82335561	PO ≠ 4500013116 4500012378 4500014691 4500013116	1330430 1334505 1366027 1330430	\$179,754.10 \$15,000.00 \$1,000.95 \$114,293.18	07/03/2010 07/02/2010 07/01/2010 06/27/2010
Orders Invoices RGA + Date Created 06/03/2010 06/02/2010 06/01/2010 05/23/2010 05/27/2010	s Notes Conta Status LATE LATE LATE LATE LATE LATE	 Invoice # 91915940 91915592 91915243 91915243 91913714 			1339439 1334505 1366027 1330430 1339439	\$179,754.10 \$15,000.00 \$1,000.96 \$114,203.18 \$32,832.30	07/03/2010 07/02/2010 07/01/2010 06/27/2010 06/26/2010

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.

	inded Customer				
value M	inded Customer				
Compan	У				
Gt Solar					
243 Daniel	Webster Highway				
	NIL 03054 US				
p. 603-883	-5200 f. 603-595-6993				
YID Pla	in VS, Actual Report				
Reques	L Scorecard				
Orders]	Invuices RGA's Notes Contacts Interactions DG/GG Funnel Outbound Calls				
					VIEW ALL INVESTORS
					VIEW ALL INVOICES
Invoice	Number: 91914046				
	Number: 91911046 Material	QLy	Price	Unit	New Invoi
Item #	Material 00000000000040019	Qly 10	Price \$301.00	Unit 1 EA	View Invoi Velu
Invoice Item 4 0010	Material 0000000000000000000000000 **~SEALMECHANICAL WITH VITON W/HE-11		\$301.00		View Invoid Valu \$3,010.0
Ilem 4	Material 00000000000040019				View Invoi Valu \$3,010.0 (\$301.00
Ilem # 0010	Material 000000000000000019 **~oSEALMECHANICAL WITH VITON W/HE-11 Irricing Discount %		\$301.00	1 EA	View Invoi Valu \$3,010.0 (\$301.00 \$2,709.0
Item #	Material 0000000000014019 ************************************	10	\$301.00 10.00% \$270.90	1 EA 1 EA	View Invoi Velu

- 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

Value Minded Co	istome	÷F							View Custo	mer Perspective: Select User-
Company										
Tha Inc - (Do No	ot Mail	Invoid	tes)							
1944 W. 95th St. Ste	. 345									
enexa, KS 66215 US										
. 913 888 8486 f. 9	13 888	7176								
YID Plan VS. Actu	al Repor	1								
Orders Invoices	RGA's	Notes	Contacts	Interactions	BS/GS	SSI's	Outbound Calls	T.O.P.S. Settings	s Tuthill Contacts	
- Date	_		¢ RG	íā #			\$ PO #	‡ An	ount	+ Status
			70069	9709			105876	\$1,52	1.30	Pending
04/29/2010										

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

value mi	nded Customer							viev	Custo	mer Perspectiv	re: Select User
Compan	у										
ha Inc	(Do Not Mail Invoid	res)									
	51h SL. Ste. 345										
enexa, KS	66215 US										
. 913 888	8486 f. 913 888 7476										
YTD PL	m VS. Actual Report										
_											
Orders 1	invoices RGA's Notes	Contacts	Interactions	BS/GS	SSI's	Outbound Calls	T.O.P.S. Settings	Tuthill Contact	s		
											VIEW RGA'S
View O	rder Confirmation										
PO Numb Credit Me Credit Me	er: 105843 mo#: n/a mo Dale:										Order Status: Ope
PO Numb Credit Me Credit Me Comment	er: 105843 mo#: n/a mo Dale:		Descrip	ition			Item Price	Currency	Qty	Delv, Qty	Order Status: Ope Sched. Ship Da
PO Numb Credit Me	er: 105843 mo#: n/a mo Dale: s:	_		tion P 3200-17	/46	_	Item Price \$252.00	Currency USD	Qty 1	Delv, Qty 0	·····

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.

mpany		
Eterpillar Forest Products Inc - Accounts Payable Bux 999 Mail Drup Dq yton, NC 27/28 US 1950/96764 - 4, 1950/97631		
YTD Plan VS. Actual Report		
Request Score-and		
ders In A A's Notes Contacts Interactions BS/GS Funnel Outb	und Calls	
tes	Create	
2010 Chad Gabriel	<u>rdit</u>	/
Sep Download Attachment ColdFusion Security Sample note Wed J 42 am	Delete 200	
2010 Chad Gabriel	Edit	
Sep Catorpillar is spolled with two "L"'s. 20	Delete	Browse
Wed		Drowse
:42 am		Add No

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.

Value Minded C	ustomer						
Company							
Caterpillar Fore	st Products Inc	Accounts Payal	le				
o Box 999 Mail Drop	p Dy						
Clayton, NC 27528 U							
o. 9192092624 f. 9	192092631						
YTD Plan VS. Act	ual Report						
Kequest Scorecar	rd						
-	rd RGA's Notes Conta	acts Interactions	BS/GS Funnel O	utbound Calls			
		acts Interactions	BS/GS Funnel O	utbound Calls		ADD	CONTACT
-		acts Interactions	BS/GS Funnel O	utbound Calls		ADD C	CONTACT
		acts Interactions	BS/GS Funnel O	tbound Calls	t Fmail	ADD	CONTACT
-	RGA's Notes Conta				÷ Email york_lssAcat.com	ADD C	Detete

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.



First Name*:		
Last Name*:		1
Title:		
City:		
State:		
Country*:	Choose	•
Phone*:		Ext
Mobile:]
Fax:		
Email:		

- 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

	ADD CONTAC
‡ Email	
york_lisa@cat.com	Edit Dele

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

Last Name: Worster Title: Sales Rep Phone: 8885551212 Mobile: 8885551200 Fax: 8885551100 Email: bworster@tuthill.com	ete Contact First Name:	e and the second s	
Title: Sales Rep Phone: 8885551212 Mobile: 8885551200 Fax: 8885551100			
Mobile: 8885551200 Fax: 8885551100			
Fax: 8885551100	Phone:	8885551212	
	Mobile:	8885551200	
Email: bworster@tuthill.com	Fax:	8885551100	
	Email:	bworster@tuthill.com	

- 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

	ADD CONTACT
‡ Email	
york_lisa@cat.com	Edit Delete

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.

First Name*:	Bill	
Last Name*:	Worster	
Title*:	Sales Rep	
Phone*:	8885551212	Ext.
Mobile:	8885551200	
Fax:	8885551100	
Email*:	bworster@tuthill.com	

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.

/iew Contact	Σ
View Contact	
First Name:	LISA
Last Name:	YORK
Title:	Buyer
City:	
State:	
Phone:	9192092624
Mobile:	
Fax:	
Email:	york_lisa@cat.com

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.

Currently Not a VI	AC					VICH GUSEC	mer Perspective	: Select User
Company								
W W Grainger Inc	*V4180* - ** Ac	counts Paya	ble **					
ept E								
kokie, 11 60077-8548 U	5							
. 8476478900 t. 8479								
YTD Plan VS. Actual	Report							
Request New Scoreco	ard							
	22, 2010) - View Histo	IV.						
Send Customer Cred	it Application Request							
al Send Customer Cred	it Application Request							
Ordere Investore DC	A's Notes Contacts		DC/CC	Current Outbound (Calls T.O.P.S. Settings	Turkill Constants		
Orbers involces RG	A.S NOLES CONTACLS	Interactions	03/63		alis 1.0.P.S. Settings	Tuthin Contacts		
Interactions Fee	dhack							
Interactions © Fee	dback						Г	CORATE NEW INTERACTIO
Interactions [®] Γee	edback						ſ	CREATE NEW INTERACTIO
			1				[CREATE NEW INTERACTIO
• Date	*dback * Status	† Ticket #	+ Origin		+ Category		SubCategory	CREATE NEW INTERACTIO
* Date 05/20/2010	÷ Status In Process	10057	1.O.P.S.		Quality		General	CREATE NEW INTERACTIO
 Date 05/20/2010 04/07/2010 	Status In Process Submitted	10057 10054	1.0.P.S. T.O.P.S.		Quality Pricing		General General	CREATE NEW INTERACTIO
- Date 05/20/2010 04/07/2010 12/30/2009	÷ Status In Process Submitted In Process	10057 10054 10052	1.0.P.S. T.O.P.S. Email		Quality Pricing Applications		General General Competitor	CREATE NEW INTERACTIO
- Date 05/20/2010 04/07/2010 12/30/2009 12/30/2009	Status In Process Submitted In Process In Process In Process In Process	10057 10054 10052 10051	T.O.P.S. T.O.P.S. Email Fax		Quality Pricing Applications Catalog		General General Competitor General	CREATE NEW INTERACTIO
Date 05/20/2010 04/07/2010 12/30/2009 12/30/2009 12/10/2009 12/10/2009	Status In Process Submitted In Process In Process In Process In Process	10057 10054 10052 10051 10047	T.O.P.S. T.O.P.S. Email Fax Email		Quality Pricing Applications Catalog Applications		General General Competitor General General	CREATE NEW INTERACTIO
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 Date 05/20/2010 04/07/2010 12/30/2009 12/10/2009 12/02/2009 12/02/2009 12/02/2009 11/23/2009 11/13/2009 11/12/2009 11/12/2009 11/12/2009 	Status In Process Submitted In Process In Pro	10057 10054 10052 10051 10047 10042 10040 10030 10037 10035	L.O.P.S. T.O.P.S. Email Fax Email Chat Chat T.O.P.S. Fax Chat Chat Chat Email		Quality Prining Applications Catalog Applications Applications Applications Pricing Catalog Applications Lead times Catalog		General General Campetitor General General General General General General General Campetitor General Campetitor	CAPATE NEW INTERACTIO
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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

	BS/GS	Funnel	Outbound Calls	T.O.P.S. Settings	Tuthill Contacts		
						CREATE NEW 1	INTERACT
#	¢ Origi	n	÷ c	ategory		\$ SubCategory	INTERACT
#	¢ Origin T.O.P.S.	n	¢ C Qua				INTERNET
	CONTRACTOR OF THE OWNER.	n	Too and the second seco	lity		† SubCategory	INTERNET

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

Contact:	Denise Isaacs	•			
Category:	Choose One	•	Sub-Category:	Choose One	•
Origin:	Choose One	-	Series:	Choose One	
ase note detail:	s of your situation and	what out	come you seek.		
ase note detail:	s of your situation and	what out	come you seek.		-
ase note detail:	s of your situation and	what out	come you seek.		
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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

Surrently Not a VMC	View Costomer Perspective:
Company	
V W Grainger Inc *V4180* - ** Accounts Payable **	
Depl F	
kokie, IL 60077-0540 US	
. 81/61/8900 f. 81/913/1/6	
YTD Plan VS. Actual Report	
Request New Scorecard	
View Scorecard (July 22, 2010) - View History	
Send Customer Credit Application Request	
Orders Invoices RGA's Notes Contacts Interactions BS/GS	Funnel Outbound Calls T.O.P.S. Settings Tuthill Contacts
Interactions	\frown
	A DINTERACTIONS CREATE NEW INTERACTION
Details	Update
Name: Vito Pellicano	Location: Fort Wayne - Change B
Name: Vitu Pellicanu	Location: Fort Wayne Change B Assigned to: Mark Atmeida
Name: Vito Pellicano Status: In Process	Location: Fort Wayne Change B Assigned to: Mark Almeida Attach File: Biowse
Name: Vitu Pallicanu Stotus: In Process Iicket #: 10057 C	Location: Fort Wayne - Change B Assigned to: Mark Almeda - Attach File: Biowse
Neme: Vilu Pellicanu Gtotus: In Process Hicket #: 100x/ Created: 05/20/2010 1:20 PM Celergoy: Quality V Sub Category: General	Location: Fort Wayne Change B Assigned to: Mark Atmeids Attach File: Biowse
Nerrie: Vilo Pellikarro Status: In Process Ticket #: 1005/ Created: 05/20/2010 1:20 PM Calegory: Quelly	Location: Fort Wayne - Change B Assigned to: Mark Almeda - Attach File: Biowse
Name: Vilu Pellicanu Gtotus: In Process Hicket #: 100x/ Created: 05/20/2010 1:20 PM Celleguy: Quality V Sub Category: General	Location: Fart Wayne - Change B Assigned to: Mark Almeda - Attach File: Browse
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Name: Vilu Pellicanu Gtotus: In Process Hicket #: 1005/ Created: 05/20/2010 1:20 PM Cdreagy: Quality Sub Category: General Origin: 1.0.PLS. Series: 100	Location: Fort Wayne - Chonge B Assigned to: Mark Almeda Attach File: Browse Work Log: F
Name: Vilu Pallicanu Gtotus: In Process Hicket #: 1005/ Crented: 0.5/20/2010 1:20 PM Celegury: Diality Sub Category: General Origin: 1.0.P.S.	Location: Fort Wayne - Change B Assigned to: Mark Almeids - Attach File: Work Log:
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Name: Vilu Pellicanu Gtotus: In Process Ticket #: 1005/ Created: D5/20/2010 1:20 PM Celegory: Quality Sub Category: Quality Origin: 1.0.P.S. Series: 100 Vorklog	Close: Close: Close: Interestion:

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.

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9/08/2010			Competitor	n/a	Yacıne3 Merdjemak	Vito Pellicano	Download
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09/08/2010 09/00/2010 09/08/2010 09/08/2010 09/08/2010 05/20/2010				100 100 100	Yacine3 Merdjemak Shayne Habicht Vito Pellicano	Vito Pellicano Vito Pellicano Vito Pellicano	Download n/s n/a

- 1. Select the Feedback radio button to view feedback within the Interactions tab
- 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

ng feathers. Ours can't. A
-
Origin: Service Call 09/08/201

- 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

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			ADD FEEDBA
* Product Series	+ Contact	* Entered By	+ Attachment
Product Series 100	≑ Contact Yacine3 Merdjemak	Entered By Vito Pellicano	
100	Yacine3 Merdjemak	Vito Pellicano	n/a
100 n/a	Yacine3 Merdjemak Yacine3 Merdjemak	Vito Pellicano Vito Pellicano	n/a Download

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

Category*: Choose One Sub-Category*: Choose One Origin*: Choose One Series: Choose One scription*: Attach File: Browse	Contact*:	Choose One	-			
scription*:	Category*:	Choose One	- Sub-	Category*:	Choose One	-
Attach File:	Origin*:	Choose One	-	Series:	Choose One	
	Attach Eile:	Browse				

- 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.

Customer - #0000017750	
Currently Not a VMC	View Customer Perspective: Select User
Company	
W W Grainger Inc *V4180* - ** Accounts Payable **	
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Skokie, 11 60077-8548 US	
p. 8476478900 f. 8479137476	
III YTD Plan VS. Actual Report	
Request New Scorecard Yiew Mistory Yiew Scorecard (2019) 22, 20101 - View History	
Send Customer Credit Application Request	
Orders Invoices RGA's Notes Contacts Interactions DS/GS Found Outbound	Colls T.O.P.S. Settings Tutbill Contacts
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Blue Sheets	Green Sheets
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Vito Pellicano	Vito Pellicano
Tuthill Blue Sheet all tabs - 1030093.xis edit delete	

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

Attach	Σ
Attach Blue Sheet	
Choose File:	Browse
	Attach Blue Sheet

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

Attach	X
Are you sure you want to delete?	
Tuthill Green Sheet all tabs - 1103091.xls	
No, Cancel Yes, Delete	ſ
	F



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.

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el						
C, NC, Service	Company	Channel Partner	RSM	Product/Service /Solution	Sales Revenue	Gross Mangin Dollars
	W W GRAINGER INC. Q.		1	[
Service	GRAINGER INC *V4180*	Chad's Auto Warehouse	CNG	FR1210C	\$50,000.00	\$20,000.00
					\$50,000.00	\$20,000.00
NC	W W GRAINGER INC "V	Jason's Junk Pile	JS	Chemtraveller	\$10,000.00	\$4,000.00
					\$10,000.00	\$4,000.00
с	W W GRAINGER INC *V	Vito's Wholesale	VP	400	\$20,000.00	\$8,000.00
					\$20,000.00	\$8,000.00
				Funnel Subtotal	\$60,000.00	\$24,000.00
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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.

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Currently Not a VI	мс		View Cus	tomer Perspective:	Select User
Company					
W W Grainger Inc	*V4180* - ** Accounts P	ayable **			
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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

W W Gr	rainger T	nc *V	4180*	- ** Ac	counts Paya	hle **				
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Orders	Invoices	RGA's	Notes	Contacts	Interactions	BS/GS	Funnel	Outbound Calls	T.O.P.S. Settings	Tuthill Contacts
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V	OC Occur	red: 🤅	Yes @	No						
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Other	Notificatio Recurrer		Yes @	No				~		
Other		ice: @	Yes @	No						

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.

Recurrence:	🖲 Yes 🔘 No				
Recurrence Type:	Weekly				
Weekly:	Recur every week on				
	Mon Tue Wed Thu Fri				
Start:					
Range:	No end date				
	End after 1 occurrences				
	💿 End By 🧱				

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.

Customer #0000017750	
Corrently Not a VMC	View Customer Perspective
Company	
W W Grainger Inc *V4180* - ** Accounts Payable **	
Dept F	
Skokie, IL 60077-0548 US	
p. 84/64/8900 f. 84/913/4/6	
TD Plan VS. Actual Report	
兩 Request New Scorecard	
View Scorecard (July 22, 2010) - View History	
Send Customer Credit Application Request	
an Send Customer Credit Application Request	
Orders Invoices BGA's Notes Contacts Interactions 124/66	Lunnel Colliniant Colls, 1.0.8.5. Settings, 11thill Contacts
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Tille: Follow Up Call: New Parchase Date Created: 09/29/2010	Intention
Tille: Follow Up Call: New Furchase Date Created: 09/29/2010 Due Date: 09/30/2010	Intention Ask how new pump is working out for Grainger.
Title: Follow Up Call: New Forchase Date Created: 09/29/2010 Due Date: 09/30/2010 Created By: Chad Gabriel	Intention Ask how new pump is working out for Grainger. Result
Title: Fullow Up Call: New Fundhase Date Created: 09/29/2010 Due Date: 09/30/2010 Created By: Chad Gabriel Assigned To: Chad Gabriel	Intention Ask how new pump is working out for Grainger. Result
Title: Fullow Up Call: New Furchase Dete Created: 09/29/2010 Due Date: 09/20/2010 Created By: Chad Gabriel Assigned To: Chad Gabriel Contact: Claudia Schimek <u>Edit</u>	Intention Ask how new pump is working out for Grainger. Result She loves her new pump. We should try to sell her more.
Tille: Follow Up Call: New Forchase Dete Creeted: 09/29/2010 Due Date: 09/30/2010 Created By: Chad Gabriel Assigned To: Chad Gabriel Contact: Claudia Schimek <u>Edit</u> Title: Buyer	Intention Ask how new pump is working out for Grainger. Result She loves her new pump. We should try to sell her more. Feedback
Title: Fullow Up Call: New Furchase Dete Created: 09/29/2010 Due Date: 09/20/2010 Created By: Chad Gabriel Assigned To: Chad Gabriel Contact: Claudia Schimek <u>Edit</u>	Intention Ask how new pump is working out for Groinger. Result She loves her new pump. We should try to sell her more. Feedback
Title: Fullow Up Call: Now Fundhase Dete Creeted: 09/29/2010 Due Date: 09/29/2010 Created By: Chad Gabriel Assigned To: Chad Gabriel Contract: Claudia Schimek Edit Title: Buyer Phone: 81/5550557	Intention Ask how new pump is working out for Groinger. Result She loves her new pump. We should try to sell her more. Feedback
Title: Fullow Up Call: New Funchase Date Created: 09/39/2010 Due Date: 09/39/2010 Created Wy: Chad Cabriel Assigned To: Chad Gabriel Contact: Claudia Schimek Title: Buyer Phone: 847/3530537 Mobile: Fre: Fre: 8475351125	Intention Ask how new pump is working out for Grainger. Result She loves her new pump. We should try to sell her more. Feedback Applications
Tile: Fullow Up Cull: New Fundhase Dete Creeted: 09/29/2010 Due Date: 09/30/2010 Created By: Chad Gabriel Assigned To: Chad Gabriel Contact: Claudia Schimek <u>Edit</u> Title: Buyer Phone: 81/3550537 Mobile:	Intention Ask how new pump is working out for Grainger. Result She loves her new pump. We should try to sell her more. Feedback ADD FEEDDACK Applications 09/29/20
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Tille: Fullow Up Call: New Funchase Dete Created: 09/29/2010 Due Date: 09/30/2010 Created By: Chad Gabriel Assigned To: Chad Gabriel Contect: Claudia Schimek: Edit Title: Buyer Phone: 81/5550537 Mobile: Fax: 8475351125 Email: Claudia.Schimek@Grainger.com	Intention Ask how new pump is working out for Grainger. Result She loves her new pump. We should try to sell her more. Feedback Applications
Dete Created: 09/29/2010 Duo Date: 09/30/2010 Created By: Chad Gabriel Assigned To: Chad Gabriel Contact: Claudia Schimek: <u>Edit</u> Title: Buyer Hhone: 81/3530537 Mobile: Fix: 8475351125 Email: Claudia.Schimek@Grainger.com Address: City:	Intention Ask how new pump is working out for Grainger. Result She loves her new pump. We should try to sell her more. Feedback ADD ITEDDACK Applications 09/29/20

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.

• Due Date	Date Called	🗘 🗘 Next Call Intention) 🗘 Statu
12/8/2009	n/a		Open
12/7/2009	n/a		Open
12/4/2009	n/a		Open
12/3/2009	n/a		Open
12/2/2009	n/a		Open
12/1/2009	n/a		Open
11/30/2009	n/a		Open
11/27/2009	n/a		Open
11/26/2009	n/a		Open
11/25/2009	n/a		Open
100 - Entries	Per Page 🙀 4	N 14	Displaying Page 1 of



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.

	View Customer Perspective: Scient User
Company	
W W Grainger Inc *V4180* - ** Accounts Payable **	
Dept E	
Skokie, IL 60077-8548 US	
p. 8476478900 t. 8479137476	
M YTD Plan VS. Actual Report	
Request New Scorecard	
View Scorecard (July 22, 2010) - View History	
Sond Customer Credit Application Request	
Orders Invoices RGA's Notes Contacts Interactions BS/GS Funnel Outbound Calls T.O.P.S	5. Settinns Tuthill Contacts
Enable or disable TOPS functionality for this customer.	
Enable of disable rops functionality for this costomer.	
V Invoices	
Coline Chat	
Online Payment Processing	
Order Entry	
Order Entry	
Order Entry Order History/Status	
Order Entry Order History/Status Part Number Cross Reference	
Order Entry Order History/Status Part Number Cross Reference Product Lead Time & Pricing	

- 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.

Select the contact you want to be set as primary fro Primary: Choose Save	m the choosen contacts below.
Check the contacts you wish to show up on T.O.P.S.	Save Changes
□ Tamara Coday Account Administrator/Shipping Manager tcoday@tuthill.com p. 4174477372 f. 4174477226	Jason Dooley Account Administrator jdooley@tuthill.com p. 4174477287 f. 4174477226
Denni Hull Service Co-Ordinator jhull@tuthill.com p. 4174477378 f.	Teresa Irvin International & Truck Account Administrator tirvin@tuthill.com p. 4174477285 f. 4174477214
Ted Kehl Application Engineer tkehl@tuthill.com p. 4174477339 f.	Veronica Parker-Sartin Lead Account Administrator vparker-sartin@tuthill.com p. 4174477264 f. 4174477226

- 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



- 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.

Part #:	FR1210C
Description:	12V DC PUMP 1200C
Weight:	33.0 LB
Dimensions:	n/a
Qty:	5 Submit
Lead Time:	3 Days
List Price:	\$183.50
Cust. Price:	\$183.50
Line Net:	\$917.50

- 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.

roduct Cross-Reference		
Type:	Choose a Type 🔽	
	Choose a Type	
	Customer	
	Competitor	
0	Obsolete	

- 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.

Type: Customer	Type: Competitor
Account #*: 0000017750	Product #*: Lookup
Product #*: Lookup	🗇 Starts With 🖤 Contains 🐵 Exact
Starts With Contains Exact	

- 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

Calculate Shipping Rates	
Search and Add Products	Products Chosen
Product #*: spf12 Search Starts With Exact	

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

Search and Add Products	Products Chosen	
Product #*: Search		
③ Starts With 〇 Exact		

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

4. Enter the From and To Zip Codes

rch and Add Products	Products Chosen				
Product #*: Search	Product #		Qty		
Course and	SPF12		1000	±	remo
 Starts With C Exact 	SPF4	Ξ	57	æ	remo
		т	otal Weight	t:	675.42
		Fro	m Zip Code	:	46774
			To Zlp Code		53404

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:

providesupport.com/view/inde	x;wsid=60ml	lg966c57iu
Currently in room: <u>John, De</u>	emo1 🔶	5 Customer Support
John: I have a guestion abo	ut your pro	ducts.
Welcome John! You	ir request	has been directed to the Customer Service department. Please wait for our operator to answer
Call accepted by op	erator De	mo1, Currently in room: Demo1, John.
Demo1: Hello John		
Select Canned Response	•	✓
How can I help you?		3
Operators Visitors	1	پ
Operators Visitors IP Address, Host Name	Hits, Duration	Dataile
IP Address,		Details
IP Address, Host Name	Duration	Details
IP Address, Host Name 121.96.182.69 121.96.182.49.bti.net.ph Philipoines, Bulacan, Diliman 189.78.4.224	Duration 1 1:43:39	Details Location: http://www.mwebsite.com/catalog/desses.html Referrer: http://www.google.com/search?hl=en&scource=ho&g=designer+dress&cts=125587087894&ag=f&og= Browser/OS: CLR 3.5.30729; NET CLR 3.0.30618; OfficeLiveConnector.1.3; OfficeLivePatch.0.0)
IP Address, Host Name 121.96.182.69 121.96.182.69.bti.net.ph Philippines, Bulacan, Diliman	Duration	Details Location: http://www.mywebsite.com/catalog/dresses.html Referrer: http://www.apogle.com/search?hi=en8cource=hp8g=designer+dress8cts=12558708788948ag=f8og=Browser/OS; Mozilla/4.0 (compatible; MSIE 7.0; Windows NT 6.0; GTB6; SLCC1; .NET CLR 2.0.5 (4) Browser/OS; cLR 3.5.30729; .NET CLR 3.0.30618; OfficeLiveConnector.1.3; OfficeLivePatch.0.0) Location: http://www.mywebsite.com/index.html Referrer: Unknown
IP Address, Host Name 121.96.182.69 121.96.182.69.bti.net.ph Philipoines, Bulacan, Diliman 189.78.4.224 189.78.4. 224.dsl.telesp.net.br Brazil, Sao Paulo, São Paulo 212.68.55.138	1 1:43:39 1 0:00:30	Details Location: http://www.mywebsite.com/catalog/dresses.html Referrer: http://www.oogle.com/search?hl=en8source=ho8g=desioner+dress8ats=12558708738948ag=f8og= Browser/OS: Mozilla/4.0 (compatible; MSIE 7.0; Windows NT 6.0; GTB6; SLCC1; .NET CLR 2.0.5 (*) Browser/OS: CLR 3.5.30729; .NET CLR 3.0.30618; OfficeLiveConnector:1.3; OfficeLivePatch.0.0) (*) Location: http://www.mywebsite.com/index.html Referrer: Unknown Browser/OS: Mozilla/5.0 (Windows; U; Windows NT 5.1; rv:1.9.0.11) Gecke/2009060215 Firefox/3.0.3 Location: http://www.mywebsite.com/account/add3o-shopping-cart.html
IP Address, Host Name 121.96.182.69 Philippines, Bulacan, Diliman 189.78.4.224 189.78.4.224 189.78.4.224 189.78.4.224 189.78.4.224 Iso Paulo	Duration 1 1:43:39	Details Location: http://www.mywebsite.com/cataloo/dresses.html Referrer: http://www.goode.com/search/hl-en8cource-h08g-designer+dress8cts=12558708788948ag-f8og- Browser/OS: Browser/OS: CLR 3.5.30729; .NET CLR 3.0.30618; OfficeLiveConnector:1.3; OfficeLivePatch.0.0) Location: http://www.mywebsite.com/index.html Referrer: Unknown Browser/OS: Mozilla/5.0 (Windows; U; Windows NT 5.1; rv:1.9.0.11) Gecke/2009060215 Firefox/3.0.3
IP Address, Host Name 121.96.182.69 121.96.182.69 bti.net.ph Philippines, Bulacan, Dilman 189.78.4.224 189-78.4.224 189-78.4.224 24.dsl.telesp.net.br Brazil, Sao Paulo, São Paulo 212.68.55.138 bulten.pronet.com.tr Turkey, Istanbul	Duration 1 1:43:39 0:00:30 870	Details Location: http://www.mwwebsite.com/catalog/dresses.html Referrer: http://www.mwwebsite.com/catalog/dresses.html Mozilla/4.0 (comp patible): MSIE 7.0; Windows NT 6.0; GTB6; SLCC1; .NET CLR 2.0.5 Browser/OS: CLR 3.5.30729; .NET CLR 3.0.30618; OfficeLiveConnector.1.3; OfficeLivePatch.0.0) Location: http://www.mwwebsite.com/index.html Referrer: Unknown Browser/OS: Mozilla/5.0 (Windows; U; Windows NT 5.1; rv:1.9.0.11) Gecko/2009060215 Firefox/3.0.1 Location: http://www.mwwebsite.com/accuth/add.to-shopping-cat.html Referrer: Unknown Browser/OS: Mozilla/5.0 (Windows; U; Windows NT 5.1; rv:1.9.0.11) Gecko/2009060215 Firefox/3.0.1

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 Name	e 🔺	Is Open	Open at Startup	
default		Yes	Yes	
mike		Yes		_
 mary			Yes	
		Close	Options D	elete
Create New Operator Pr	ofile	Close	Options D	elete

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
- 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.

🗚 Profile "default" - Ope	erator Console Options 🛛 🛛 🔀
General	Common Settings for all Profiles Launch Operator Console when Windows starts
Nogin 🍂 Login	Startup
Connection	 Open profile "default" when Operator Console starts Automatically login when Main Window is opening
Events	Hide Main Window into System Tray when Operator Console starts
ABC Spelling	My Status Show me Away when I'm inactive for 15
Operators	Show me Away when I login
k Visitors	System Tray Hide Operator Console to System Tray when I minimize it
궁 Geo-Location	Hide Operator Console to System Tray when I try to close it
Co-Browser	Show number of visitors in System Tray Icon when the visitor monitoring is enabled
(RTL> Regional	Ok Cancel Apply

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.

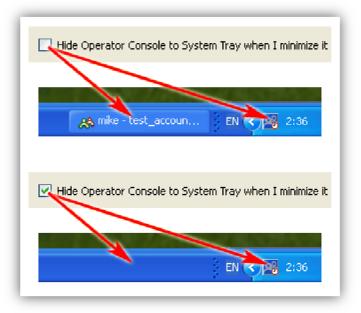
Check **Show me Away when I'm inactive for X minutes** option if you wish the console to automatically switch to **Away** status after X minutes of the computer idle time. This option can be useful if you step away from your computer often and don't wish to miss calls.

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.

🚜 Profile "mike" - Opera	tor Console Options	s
General	C Login Fields	
General	Account Name:	test_account
My Login	Operator Login:	mike
Connection	Operator Password:	
	Options	
Events	Remember my op	perator password on this computer
ABC Spelling		
Operators		
🧞 Visitors		
🧭 Geo-Location		
Co-Browser		
(RTL> Regional		Ok Cancel Apply

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.

🗚 Profile "mike" - Opera	rtor Console Options 🛛 🛛 🔀
General	Proxy Settings Use Internet Explorer Proxy Settings
Magin Login	 Direct connection to Internet Use Custom Proxy Server for plain connections.
Connection	Custom Proxy Server Settings
Events	Proxy Address: Proxy Port: 0 Proxy User Name:
ABC Spelling	Proxy Password:
Operators	Troubleshooting
k Visitors	Keep log file until first successful connect (recommended) Keep log file permanently (use this option for troubleshooting only)
🧭 Geo-Location	
😂 Co-Browser	
(RTL> Regional	Ok Cancel Apply

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.

📣 Profile "mike" - Opera	ntor Console Options			X
General	- On Visitor Call		- On System Message	
	Play Sound Alert	Play	✓ Play Sound Alert	Play
M Login	Raise Operator Console		Raise Operator Console	
Connection	On Operator To Operator Call —		- On User Message	
	Play Sound Alert	Play	Play Sound Alert	Play
Events	🗹 Raise Operator Console		Raise Operator Console	
ABC Spelling	On New Visitor Enter the Site —			
2 Operators	Play Sound Alert	Play		
	🔲 Raise Operator Console			
Visitors	Play Sound Method (This setting	is common fo	r all profiles)	
🦻 Geo-Location	Play sound via DirectSound (lefault)		
Co-Browser	Play sound using standard W	indows meth	od	
Regional			Ok Cancel	Apply

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.

🚜 Profile "mike" - Opera	ator Console Options	×
🛄 General	Disable instant spelling check	Reset
Nogin 🍂	Choose Languages: English (USA)	×
Connection	General Options	Ignore upper case words (e.g. ASAP)
Events	 Split hyphenated words Strip possessives 	 Ignore capitalized words (e.g. Ameli) Ignore mixed case (e.g. PrintScreen)
Spelling		Ignore mixed digits (e.g. Win98)
Operators	 Suggest Options Suggest phonetic 	Language Dependent Options
k Visitors	Suggest typographical	Split words (German, Finnish, Danish)
👌 Geo-Location	Suggest split words	
Co-Browser		
(RTL> Regional		Ok Cancel Apply

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.



📣 Profile "mike" - Opera	or Console Options	X
General	Disable instant spelling check	Reset
, Login	Choose Languages: Danish	
Connection	General Options Dutch Case sensitive English (British) English (British)	Medical) Ipper case words (e.g. ASAP)
F Events	Split hyphenated Strip possessives Strip possessives	an) apitalized words (e.g. Ameli) agal) aived case (e.g. PrintScreen)
Spelling	✓ English (USA Mic ✓ English (USA) Finnish	edical) nixed digits (e.g. Win98)
Operators	Suggest Options — French German Suggest phonetic Italian	Dependent Options ntracted words (French, Italian)
🧟 Visitors	Suggest typograp Suggest typograp Portuguese (Br. Dortuguese (Portuguese	«mal) azilian) prds (German, Finnish, Danish)
🦻 Geo-Location	Suggest split work Spanish Swedish	
Co-Browser		
(RTL> Regional		Ok Cancel Apply

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.



🧟 🧐 🔏 🖻 🛍 🄊 № 🍋 Our company is based in <u>NewYork</u>	New York Network Networks Networked Newark	Send
Last message received on May 29, 2009 at 1	Ignore All	
	Add word to user dictionary	
	Cut	
	Сору	
	Paste	
	Select All	
	Spelling options	
	Switch to RTL	

How the spell checker works during the chat



Operators

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

🔉 Profile "mike" - Opera	ator Console Options 🛛 🔀
General	General Show Tool Bar
Nogin 🍂	Operator Table Columns Visibility
Connection	 Show Status Column Show Nick Name Column
Events	Show Full Name Column
Spelling	Show Department Column Show Email Address Column
Operators	Show Rooms Column
k Visitors	
🦻 Geo-Location	
😂 Co-Browser	
(RTL> Regional	Ok Cancel Apply

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.

📣 Profile "mike" - Opera	tor Console Options	
General	General Show Tool Bar	
Nogin	Visitor List Columns Options a	nd Visibility
Connection	Location IP Address	Location Column
Events	Host ISP Chat	Show Location Column Show Country Flag
ABC Spelling	Co-Browser Hits Duration	 Show Country Name Show Region
Operators	Current Page Custom Fields	Show City
🧞 Visitors	Referrer Browser OS	Show Zip Code
🦻 Geo-Location	User Agent	
Co-Browser		
(RTL> Regional		Ok Cancel Apply

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.

📣 Profile "mike" - Opera	itor Console Options 🛛 🔀
🛄 General	Color scheme: Sky (Default)
Nogin 🍂 Login	Show Legend
Connection	Show "New Visitor" tool tip during 30 🤤 seconds
Events	Show Day/Night Shadow
ABC Spelling	Colorize Time Zones
Operators	
k Visitors	
o Geo-Location	
Co-Browser	
(RTL> Regional	Ok Cancel Apply

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

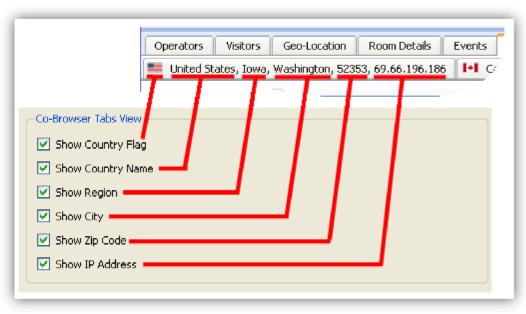
You can change the **Co-Browser headers** appearance in this tab. Headers appear in the Co-Browser when two or more Co-Browser sessions are opened in the console.

📣 Profile "mike" - Opera	tor Console Options 🛛 🛛 🔀
General	Co-Browser Tabs View
Nogin 🍂	 ✓ Show Country Name ✓ Show Region
Connection	Show City
Events	 Show Zip Code Show IP Address
ABC Spelling	
Operators	
k Visitors	
蓤 Geo-Location	
Co-Browser	
(RTL> Regional	Ok Cancel Apply

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
🚓 Profile "mike" - Opera	ator Console Options
General	Text Layout O Left-to-Right layout (European languages)
Magin Login	Right-to-Left layout (Middle Eastern languages)
Connection	
Events	
ABC Spelling	
Operators	
k Visitors	
🦻 Geo-Location	
🎯 Co-Browser	
(RTL> Regional	Ok Cancel Apply

Regional tab



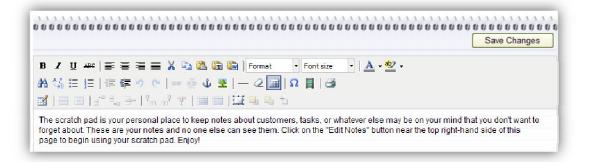
Scratch Pad

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.

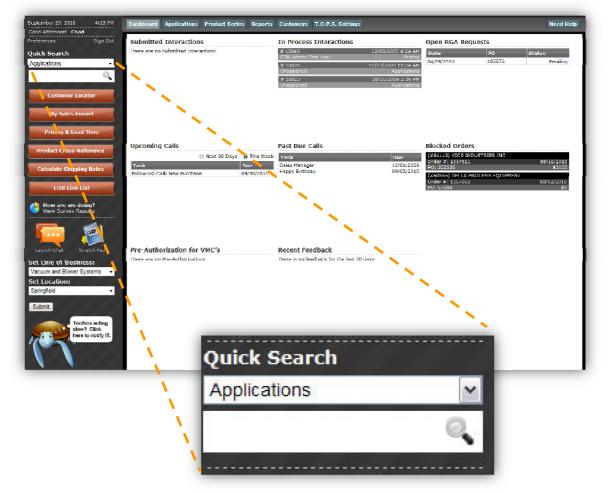


3. Click the **Save Changes** button to save any changes that you've made to your scratch pad.

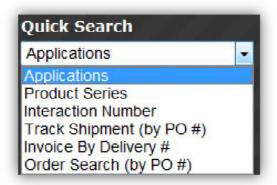


Quick Search

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#).

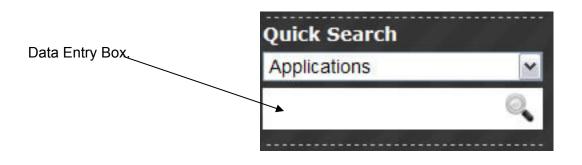


1. Expand the Quick Search menu and select Applications, Product Series, Interaction Number, Track Shipment (by PO #), Invoice By Delivery #, or Order Search (by PO#) to start.





- 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





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

		ADD PRODUCT SERIES
Choose a Series:	select 🔽	
	select	
	100	
	100	
	1200	
	1600	
	30	
	300	

- 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.

Product Series			
			ADD PRODUCT SERIES
Choose a Series: select	$\mathbf{\tilde{v}}$		
		DELETE PRODUCT SERIES	EDIT PRODUCT SERIES
1200			
)escription: This industry sta	andard DC pump dispenses up	to 15 GPM (57 LPM) The n	ump weighs less than
	e and nozzle, and has a draw		
.ink: http://www.tuthill.com/u	is/en/products/Catalog/Series	-1200C.cfm	
Materials: Remove Materials			
R110, FR1612H1255, FR1612H1339,			
Add Material(s)			
Part Number:	Search/Add		
Starts With O E	xact		
Check All Uncheck All			
Check All Oncheck All			
FR1204 pump fr1210c no/hose nozz cable	FR1205CE 12v dc pump european	FR1210C 12v dc pump 1200c	
FR1210CA	FR1211C	FR1211CI	
12v dc pump auto nozzle	12v dc pump with meter	12v dc pump with me	er liter
	Add Material	S	
	Add Material	5	

- 3. Enter an exact or partial part number and click Search/Add
- 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

Add Application	
Title*:	
Keywords:	
	Add Application

Editing an Application

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

Applications	_	_	_	_	_	_	_	_
Applications								ADD APPLICATION
hoose an Application:	Select	•						
	Apple Thower Hand Pump Hand Pumps							
	My Application Pumping Feathers pumping feathers							

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.



Applications	
	ADD APPLICATION
Choose an Application: Pumping Leathers •	
	DELETE APPLICATION EDIT APPLICATION
Pumping Feathers	
Keywords: Ducks, feathers, pump, quack job, cheese, pumping cheese	
	ATTACH PRODUCT SERIES
Product Series	
1200 - View Materials This industry standard DC pump dispenses up to 15 GPM (57 LPN). The pump weighs less than 27 pour the DC power source.	nds (12.2kg), with hose and nezzle, and has a draw that's easy on
1600	
SD60	
5D600	

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

Title*:	Pumping Feathers			
Keywords:	Ducks, feathers, pump, quack job, cheese, pumping cheese			
	Saus Change			
	Save Change			

- Modify any fields that you'd like to change
 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.

Available Series	Selected Series	
100	1200	
100	1600	
30	SD600	
300	SD60	
400		
4200		
5200		
600		
700		
800	<	
820		
825		
900		
Cabinet Pumps		
Filters		
Kits		
Nozzles	~	
	Cancel Save	

- 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.

							ADD FEEDBACK
Fliter							
From:	Category:	Chaose One	- Series: Choose One				
10:	Sub-Category:	Choose One	- Origin: Choos	e One Search			
							DOWNLOAD TO EXCEL
- Date	+ Customer	+ Category	+ SubCategory	* Product Series	+ Contact	÷ Entered By	+ Attachment
09/29/2010	W W GRAINGER INC "V418	0" 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 Habieht	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	Swively	Vito Pellicano	Vite 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/#	text	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	text2	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



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

Feedback		×
Applications Serles: 100		
Download Attachn		
Our competitor	s provide this service for free.	*
		*
	Origin: Service Call U9/	(08/2010
5 This		

- 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

							ADD FEEDBAC
ilter							
rom:	Category:	Choose One	Series: Choos	se One 👻			
o:	Sub-Category:	Choose One	Origin: Choos	se One +			
				Search		L	DOWNI OAD TO EXCE
• Date	+ Customer	Category	+ SubCategory	* Product Series	+ Contact	÷ Entered By	+ Attachment
09/29/2010	W W GRAINGER INC *V418		Product	1200	Claudia Schimek	Chad Gabriel	n/a
09/08/2010	W W GRAINGER INC	Applications	Competitor	100	Yacıne3 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	11/u
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		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	304437	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 <u>add feedback</u> 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.

Filter Due Dates			
From:			
Fo: 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 Ir, 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 Ir, 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 Ir, Scottie
Introduction Call	09/30/10	True	Pennington Jr, Scottie
Introduction call	09/30/10	True	Pennington Ir, Scottie
TOPS	09/30/10	Irue	Pennington Jr, Scottie
TOPS	09/30/10	True	Pennington Ir, 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 Ir, Scottie
TOPS	09/30/10	True	Pennington Jr, Scottie
TOPS	09/30/10	Truc	Pennington Jr, Scottie

- 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 Use	rs tor your LOB			
Location	Company Name	Full Name	SAP Account #	TOPS Access
Coral Gables	grupo petro gas de monterrey	Lrik De la Cruz	021342	٥
Fort Wayne		Fill-Rite Customer	G17354	9
Fort Wayne	2	Fill-Rite Customer	C16291	9
Fort Wayne	2	Fill-Rite Customer	G17949	٢
Fort Wayne	2	Fill-Rite Customer	G60397	0
Fort Wayne		Fill Rite Customer	017753	0
I ort Wayne		Lill Rite Customer	016594	0
Fort Wayne		Lill Rite Customer	C17805	0
Fort Wayne		Fill-Rite Customer	6 18097	9
Fort Wayne	2	Fill-Rite Customer	070587	9

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

Manage SAP Account A	ssociations
Associate other SAP	accounts with user: Sotera Customer
This user is currently	associated with accounts 35781, 16974, 16900
Enter SAP Account:	
Enter Nickname:	
	Add Remove Make Default Update Nickname Done

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.

elow are TOPS Permissions enabled for your location if checked.	
Online Chat	
Online Payment Processing	
2 Order Entry	
I Order History/Status	
Part Number Cross Reference	
Product Lead Time & Pricing	
Shipment Tracking	
Shipping Rates Integration	
Warranties/Returns	

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 submenu 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

LOB/Location Settings	
Triter your Shipping Markup as a decimal 0 Triter the email for your flocation. This is used when interactions get a response from the eastemen, or a RGA has been made, nshuler@suthil.com Survey Link http://www.surveymonkey.com/s.aspx?sm=ErjA8T) view link Survey Link to Results http://www.surveymonkey.com/ar.aspx?em=qK19_2 view link BGA Instructions	 Information Shipping markup must be determined by Stratege Intent at your 100. This field online material outre utilizing online order entry and a 5%. It is recommended that you use a shared moleox for toolbox notifications, ake your use Network Administrator for hole settin this up if you don't already have one for your location's CSRs. Survey Tinks are read-only and are just present for link testing purposes. Returns page of T.O.P.S. after an RGA request is approved.
B / U 44 F 5 7 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
Please include a copy of this RGA with your return and reference the RGA# on the shipping label. Send return to. Iuthul I moster Systems RCA: (enter your RCA#) 8825 Aviation Dr. Fort Warne, In: 48809	
Click Here to View Warranty Policy	
Patr	Worde: 3
Pre RGA Instructions	
B / U → = = = = = = = = = = = = = = = = = =	
All KGA requests must include date of manufacture for all items being returned.	

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

Аппо	unce	ments
		ADD ANNOUNCEMENT
-	Edit)elete	Call Product Catalog - Active Date Modified: 07/09/2010 Download the 2010 Fill-Rite and Sotera Catalog here! The file size is 2.14 MB. read more link
1 -	Edit Delete	Welcome to T.O.P.S Active Data Modified: 10/02/2009 Welve listened to you and are very excited to open the doors to our brand new oustomer self-service portal. The Tuthil Online Portal System (T.O.P.S.) allows you to place new orders, check order status, track shipments, and to check lead times and pricing. It's also a great place for our customers to share their thoughts on how we're doing so that we can focus on continuous improvement.
	Fdit Delete	Liquid Flow Meter Catalog - Artive Date Modified: 10/02/2009 Browse our selection of liquid flow meters online at Tuthill.com. read more link
	Edil)elete	Transfer Pumps Catalog - Active Dete Modified: 09/09/2009 Browse our selection of transfer pumps online at Tuthill.com. Tead mane link



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

Title*:	Welcome to T.O.P.S.
Description*:	We've listened to you and are very excited to open the doors to our brand new customer self-service portal. The Tuthill Online Portal System (T.O.P.S.) allows you to place new orders, check order status,
Link:	http://www.tuthill.com/
Target:	Current Window 💌
Active:	Yes ○ No No
Edit Image:	Browse
Existing:	
	Save Changes

- 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 subcategories 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

when editing names of both Cate	gories and Sub-Categories, br	e aware that	if you char	ige the meaning it will reflect on	your reports.				
Categories				Sub-Categories					
Add Category: Sample FHide from TOPS Submit			Add Sub-Category:	THide trom TOPS	THide from TOPS Submit				
• Category	÷ On TOPS			 Sub Category 	‡ On TOPS				
Applications	true	Edit	Delete	Competitor	True	Edit	Delete		
Catalog	true	Edit	Delete	General	true	Edit	Delete		
Distribution Channels	True	Edit	Delete	Product	True	Edit	Delete		
Functionality	True	Ldit	Delete	lest	False		Activate		
Large Order	True	Edit	Delete	H A F H	ee a b be				
Lead Times	True	Fill	Delele						
Pricing	Truc	Edil	Delete						
Product Range	true	Edit	Delete						
Promotions and Marketing	True	Edit	Delete						
Quality	True	Ldit	Delete						
Relationship	True	Edit	Delete						
Sales Trends	True	Fill	Delele						
Service	Truc	Edil	Delete						
	Iruc	Edit	Delete						

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 reactivated 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

						ADD	
• First Name	+ Last Name	≑ Title	* Email	+ Phone	A Fau		
* First Name		∓ Πtie		÷ I nonc	‡ Fax		
Deana	Cornwell	CISR	dcornwell@tuthill.com	2507482580	2604932387	Edit	Delete
Patricia	Rhodenbaugh	CGR	prhodenbaugh@tuthill.com	2607402416	2604902007	Edit	Delete
Linda	Segyde	CSR	lsegyde@tuthill.com	2607482435	2604932387	Edit	Delete
Michele	Sheridan	CSR Manager	msheridan@tuthill.com	2607482450	2604932387	Edit	Delete

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

Title: CSR	2		
		Email:	srobinson@tuthill.com
Phone: 260-	748-2410	Fax:	260-493-2387
rimary CSR: 🔘 Y	/es 💿 No	Show to All:	🔿 Yes 💿 No
Add Image:		Browse	Add Conta

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

ontact Information	TOPS Functionality			
Enter customer	contact information	tion:		
Account #: *				
Company Name:		Title:		
First Name: *		Last Name: *		
Address Line 1:		Address Line 2:		
City:		Country: *	Select Country 💽	
Postal Code:		State:	- Select State -	*)
Phone Number:		Extention:		
Fax Number:		Email Address: *	to activate his account.	Customer needs a valid email addres

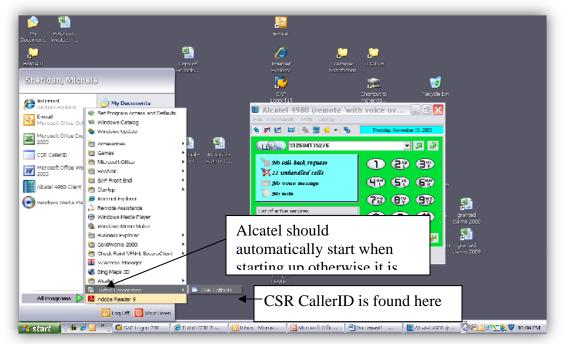
- 2. Enter the customer's SAP account number in the Account # field
- 3. Click in the First Name field and wait for SAP to autopopulate most of the fields
- 4. Enter the user's first name, last name, and e-mail address (all required)
- 5. Click on Next
- 6. Check the boxes to select the functionality 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

ontact Information	TOPS Functionality		
Enable or Disal	ble TOPS Functio	nality for this customer:	
Functionality:		Online Chat	
		Online Lead Time Check	
		Online Payment Processing	
	v	Online Price Check	
		Order Entry	
		Order History/Status	
		Part Number Cross Reference	
	☑ :	Shipment Tracking	
	Y :	Shipping Rates Integration	
		Warranties/Returns	
			<< PREV SUBMIT :



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.

Caller ID	8885551212	Go To Toolbox
Number	John Doe	



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🔹 🕼 Tallall CER Taslau					S · 🛛 · 🖶 ·	🔄 Page 🖛 🌍 Tonis 🔹
November 19, 2009 10:19 PM	Dashboard Application	s Product Series Reports	T.O.P.S. Settings	Add VMC		
Good Afternoon! Michele						
Sign Out	Customer - #00000	011411				
Customer Locator	Value Minded Custo	mer	Vi	ew Customer Perspective:	Select User	
Pricing & Lead Time	Company	Company Co				
	Ageo Corporation Jackson Operations			ohn Doc		
Product Cross Reference	202 Industrial Park			02 industrial park		
Product Cross Reference	Jackson, NN 55143 US			MN 56143 US		
	p. f.		p.	. 8885551212 f.		
Calculate Shipping Rates	Orders Invoices RGA	s Notes Contacts Interactions	SSES T.O.P.S. Sott	ings Tuthill Contacts		
	Search Order Histor	У				
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Quick Search	+ Date 11/17/2000	0001312175	464731	\$285.57	7 Credit Hold	
Quick Search Applications	• Date 11/17/2000 33/26/2009	0001312175	464731	\$285.57 \$277.00	7 Credit Hold Credit Hold	
Ilow are we doing?	• Date 11/17/2000 33/15/2009 11/11/2009	0001312175 0001311940 0001310685	464731 464555 462220	\$285.57 \$277.00 \$348.60	7 Credit Hold D Credit Hold D Credit Hold	
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Quick Search Applications	* Date 11/17/2000 33/26/2009 11/11/2009 11/11/2009	0001312175 0001312402 0001310885 0001310891	464731 454555 462220 462139	\$285.57 \$277.00 \$348.60 \$622.44	7 Credit Hold 0 Credit Hold 1 Credit Hold Credit Hold 0 Credit Hold	
Quick Search Applications	• Date 11/17/2000 13/26/2009 11/11/2009 11/11/2009 11/11/2009	0001312175 0001312840 0001310885 0001310891 0001310900	464731 454555 462220 462139 452139	\$285.57 \$277.00 \$348.60 \$522.44 \$762.54	7 Credit Hold 0 Credit Hold 0 Credit Hold 1 Credit Hold 0 Credit Hold 0 Credit Hold	
Quick Search Applications	That is T	0001312175 D0013123943 0001310885 0001310891 0001308407 0001308407 0001308408 0001307428	464731 464555 462220 462139 463016 459513 459513 459513 459513	\$285.57 \$277.00 \$348.60 \$522.44 \$70.90 \$1,061 \$390.40	7 Credit Hold 0 Credit Hold 0 Credit Hold 1 Credit Hold 0 Credit Hold 0 Credit Hold 0 Credit Hold 0 Credit Hold 0 Credit Hold 0 Credit Hold	
Quick Search Applications	104 104 104 104 104 104 104 104 104 104 104 104 104 104 107 1	0001312175 0001313047 0001310085 0001310991 0001304991 0001304407 0001304428 0001307122 000130522	464731 (864505) 462220 462130 462130 462130 462130 450513 450513 450557	5285.57 \$227.00 \$348.60 \$4527.44 \$470.90 \$1,061. \$390.10 \$282.44	7 Credit Hold 0 Credit Hold 1 Credit Hold 2 Credit Hold 0 Credit Hold 0 Credit Hold 0 Credit Hold 0 Credit Hold 00 Credit Hold 00 Credit Hold 0 Credit Hold 0 Credit Hold	
Quick Search Applications	1014 1/17/2000 3/64/2009 1//17/2000 1//1/2000 1//1/2000 1//1/2000 1//1/2000 1//1/2000 1//1/2000 1//1/2000 1//2000 1//2000 1//2000 1//2000 1//2000 1//2000 1//2000	000.312.175 000.313.043 000.131.085 000.131.085 000.131.085 000.1308407 000.1308407 000.1308427 000.1308522 0001306522 0001306522	464731 484985 462220 467139 467139 45913 459513 459513 459513 45957 457429	\$285.51 \$227.00 \$349.60 \$822.44 \$70.00 \$7,001 \$300.40 \$2470.00 \$7,001 \$300.40 \$242.44 \$744.07	7 Credit Hold 9 Credit Hold 9 Credit Hold 9 Credit Hold 9 Credit Hold 10 Credit Hold	
Quick Search Applications	Listi L/17/2000 J3/36/2009 L//1/2009 L//1/2009 L//1/2009 L//1/2009 L//20/2009 L/20/2009 L/20/2009 L/20/2009 L/20/2009 L/20/2009 L/20/2009 L/1/14/2009	0001312175 0001312175 0001310685 0001310685 0001305407 0001305407 0001305427 0001305522 0001305522 0001305522 0001305523	464731 (864505) 462220 462130 462130 462130 462130 450513 450513 450557	5285.57 \$227.00 \$348.60 \$4527.44 \$470.90 \$1,061. \$390.10 \$282.44	7 Credit Hold 9 Credit Hold 9 Credit Hold 9 Credit Hold 9 Credit Hold 10 Credit Hold	
Quick Search Applications	1011 1/17/2000 3/6/2009 1//1/2000 1//1/2000 1//1/2000 1//1/2000 1//1/2000 1//1/2000 1//1/2000 1//2000 1//2000 1//2000 1//2000 1//2000 1//2000 1//2000 1//2000	000.312.175 000.313.043 000.131.085 000.131.085 000.131.085 000.1308407 000.1308407 000.1308407 000.1308522 0001306522 0001306522	464731 484985 462220 467139 467139 45913 459513 459513 459513 45957 457429	\$285.51 \$227.00 \$349.60 \$822.44 \$70.00 \$7,001 \$300.40 \$2470.00 \$7,001 \$300.40 \$242.44 \$744.07	7 Credit Hold 9 Credit Hold 9 Credit Hold 9 Credit Hold 9 Credit Hold 10 Credit Hold	Displaying Bage I of I
Quick Search Applications	Listi L/17/2000 J3/36/2009 L//1/2009 L//1/2009 L//1/2009 L//1/2009 L//20/2009 L/20/2009 L/20/2009 L/20/2009 L/20/2009 L/20/2009 L/20/2009 L/1/14/2009	0001312175 0001312175 0001310685 0001310685 0001305407 0001305407 0001305427 0001305522 0001305522 0001305522 0001305523	464731 484985 462220 467139 467139 45913 459513 459513 459513 45957 457429	\$285.51 \$227.00 \$349.60 \$822.44 \$70.00 \$7,001 \$300.40 \$2470.00 \$7,001 \$300.40 \$242.44 \$744.07	7 Credit Hold 9 Credit Hold 9 Credit Hold 9 Credit Hold 9 Credit Hold 10 Credit Hold	

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

🕗 - 🛛 http://toolsox.tuthil.com	n/csr/index.cfm?call	d-26066702606.Name-1	4ichele%20Sheridan		🕶 47 🗙 Google	
🛠 🖉 TUB III CSR. TUUBUX					💁 - 📾 - 🖶 - 🔂	Page 👻 🌀 Tools
	Dashboard I .					
od Afternoon! Michele Signi Oot	Submitted	Interactions	in time	ess Interactions	Open RGA Requests	
		ubmitted Interations		no In Process Interactions	There are no Open RGA's	
Pricing & Lead Time						
		Customer Locater			×	
		Customer Locator		My LOB 🛞 A	ILOBN C	
Colculate Shipping Rates		No customer record is	in he friand	.,		
		Company:		Full Name:		
		Account #:		Phone:		
	My Tasks	Order #:		Cily:		
		State:	Select State - 🛛 💌	Country: - Select Co	ountry - 💌	
uick Search					Submit	
e.						
How are we doing?						
			From here	e you can loca	ate the customer	
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			•	g mormation	I III ally one of the	
			fields			
		_				
	_				😜 Truk wan si	💐 111198

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

