CROSSView Promotional Planner Reference Guide

Planner Template File

The template for your specific planner will be located on **CROSSMARKConnect** on the My Communities page.

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News Services Knowled BMy Communities	News Services Knowledge My Communities
My Communities is a collection of sites where you can find collaboration and communication communities to work with C and its clients. You will find all the CROSSMARKConnect communities you have access to and you can click on the Site the desired site. Click on the Contact name if you need to contact the site owners via e-mail. You will also be able reques communication site here. Click here to see a list of other CROSSMARKConnect communities.	Home My Communities > CROSSView Lists CROSSView is CROSSMARK's proprietary business planning process that aligns the power strength of our customer managers in the field to deliver compelling growth solutions for our c • Calendar • Planning Documents
No. Site Name 1. CROSSMARK IT Broadcast Site 2. Business Development Business Development communication site.	Recycle Bin
3. Client Advisory Board Client Advisory Board communication site.	Decision Ren Deliver 200
4. Canada - CCRT Client Services Canada CCRT Client Services Communication and Collaboration Site	² kingence Harden
5. Canada - CCRT Field Operations Reports and Metrics This site will be used to communicate metrics and reporting for the CCRT Field Operations Unit.	, ker
CROSSView CROSSView is CROSSMARK's proprietary business planning process that aligns the power of our business intelligence insights with the strength of our customer managers in the field to deliver compelling growth solutions for our clients.	Upload • Actions •
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A Make sure you are in the CROSSMark <i>Connect</i> website.	Category : About CROSSView Docs (20) Category : Client Planning Docs (33) Category : Client Planning Docs (33)
 Click the MyCommunities menu option. Click CROSSView from the list of community websites. 	 Once you are in the CROSSView website, click the Client Planning Docs category and find your specific client files.
	Your Manager will inform you of the location of your file(s.)

Worksheets Contained in the Planner

A B C D E F G Title Sheet Budget Summary Q1 Q2 Q3 Q4 Promotional Calendar ExchangeBridgeInput BudgetSummaryInput Codes-D0 NOT EDIT Image: Cod

- A Title Sheet Contains information pulled from Q1 sheet and Codes sheet.
- **Budget Summary** Is auto populated with data from the BudgetSummaryInput sheet.
- Q1, Q2, Q3, Q4 Contains the quarterly planned promotions for the client. Some data must be entered on this sheet. Some data flows from the eXchange Bridge sheet. Drop-down box data flows from the Codes sheet.
- D Promotional Calendar Contains data from the Q1, Q2, Q3, Q4 sheets and is setup for sorting and printing.
- ExchangeBridgeInput –Contains data that has been imported from eXchange Bridge regarding your specific client. The data in the sheet flows to the Q sheets and the Codes sheet. You do not need to enter any data on this sheet.
- BudgetSummaryInput –Contains budget information provided by the client and entered by the Account Executive. This data flows to the Budget Summary page.

G Codes – Contains various codes that flow to other sheets within the planner. You do not need to enter or change any data on this sheet.

Color Coded Fields

Yellow Field Headers – Enter your data in the columns with yellow headers.	User Input /	Drop Down Box	User Input
Gray Field Headers – Columns with gray headers contain automatically calco	ulated fields.	Auto Calculatio	on Field

Checklist

- Download the file and make a copy with an appropriate name for each of your clients.
- Populate the Quarterly Sheets with client data.
- Enter data for BudgetSummaryInput sheet.
- Select your options for the Promo Calendar to print for clients and management.
- Print Budget Summary page for clients and management.

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Data Flow

The diagram below shows the data flow from each of the sheets in the Planner.



eXchange Bridge Data

Data in the ExchangeBridgeInput sheet is added to the Planner file before you receive it. The data is determined by your Managing Director and is different for each client and region.

Instructions for Managing Directors to have their data populated into the sheet:

Provide a list of your bundles and categories along with the client name and date that you need the planner. Send the list to Debbie Aday at <u>debbie.aday@exchangebridge.com</u>. She will extract your data from eXchange Bridge and populate the Planner, then email the file back to you. Don't forget to include the CLIENT NAME and a date that you would like to have the populated file returned.

Details of Fields that Contain Data Flow

Worksheet	Flows to Worksheet	Flows to Fields on Worksheet
Title Sheet	Budget Summary	Region
		Division
		Plan Development Date
Q1	Title Sheet	Client Name
		Region
		Division
		Plan Development Date
		Revision Date
	Promotional Calendar	All data on the sheet
ExchangeBridgeInput	Q1	Item Description
		Item UPC
		Item Size
		Case Pack
	Codes	Category List
		Retailer List
BudgetSummaryInput	Budget Summary (for category fields)	Plan Sales
		Actual Sales
		Spending Budget
		Year to Date Sales
		Year to Date Spend
		Plan Spend
		Actual Spend
Codes	Title Sheet	Retailers
	Budget Summary	Retailer List
	Q1	All of the drop-down lists
	BudgetSummaryInput	Retailer Selection Box

Adding Data to the Q1, Q2, Q3, Q4 Tabs

The Fian	ne: Q1								
Clie	ent: Novartis	≂.							
Account Execut	ive Dalene Fornelius	3							
Regi	on: West	-							
	on: Southwest	3							
	ite: 06/18/10	.							
	on: 06/01/10	8							
									
Client Signatu	ire: Shawn Bush	-							
User Input / Drop Down Box	Auto Calculation	Field							
B	B	B	C	Customer Item	(C)	С	C	Promo	201262
			C Item UPC	Customer Item Code #	C Item Description	C Item Size	C Case Pack	Promo Description	Pro
B Customer Name	Category Analgesics	Case UPC / Bundle							Pro Typ
Customer Name	Category Analgesics Analgesics	B Case UPC / Bundle	Item UPC		Item Description	Item Size	Case Pack		Pro Typ TP
Customer Name Ibertsons (So Cal) Ibertsons (So Cal)	Analgesics Analgesics Antacids	Case UPC / Bundle	Item UPC 67200024		Item Description EXCEDRIN CAPLETS EXTRA STRENGTH	Item Size 24 CT	Case Pack 24		Pro Typ TP TP
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A Enter your account information at the top of the page.

B Input fields are shown in yellow.

Calculated fields are shown in gray.

D Enter all of your promotional product data for all retailers for the specific client in the yellow fields. Click the **drop-downs** to select your options. The data in the drop-down lists flows to the **Quarterly** sheets from the **Codes** page. The gray auto-populated fields flow from the eXchange Bridge data. There are some yellow fields that do not have drop-down lists that you will need to provide data for, such as the Customer Item Code # field. When you select an option from the yellow fields, data is automatically updated in the gray fields.

After you have entered all of your data, **Save** your file and continue to the next "**Q**" tab if your specific client is planning for those quarters as well.

Entering Data in the BudgetSummaryInput Tab

Client:								Novartis
Region:								West
Division:								Southwest
Plan Develop	ment Date:							06/18/10
		ELECT A RETAI	LER FOR INPU	Т				
	Albertsons (So Cal)	Albertsons LLC	Retailer 11	Retailer 16				
	Jewel	Other	Retailer 12	Retailer 17				
	<u>Shaws</u>	Retailer 8	Retailer 13	Retailer 18				
	Acme	Retailer 9	Retailer 14	Retailer 19				전화 상 생
	Albertsons IMW	Retailer 10	Retailer 15	Retailer 20				User Input
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			Ť					
Albertsons (So Cal)		1						
			Analg	esics				
Period		1	Plan Sales	Actual Sales	Bear to Date Sales	Year to Date Spend	Spending Plan	Actual Spending
10	1-1-10	1-1	\$200,000	\$225,000				\$16,760
20	1-1-20	1-1					1	\$0
3Q.	1-1-3Q	1-1						\$0
4Q	1-1-40	1-1						\$0
Total								\$16,760
			Anta	cids				
-					Year to Date	Year to Date	Spending	í I

Click a Retailer name from the SELECT A RETAILER FOR INPUT box at the top of the page to jump to a specific retailer to enter their data. Or simply start entering from the top in the yellow fields.

B Once again you will notice that there are yellow user input fields and gray auto calculated fields.

Enter the Plan Sales, Actual Sales, Year to Date Sales, Year to Date Spend and Spending Plan in the yellow fields.

Sorting and Printing the Promotional Calendar

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Nabertsons (So Cal) Q1 43629608 THERAFLU COLD/CHEST CONGESTION WARMIII 8.3 OZ 12 TPR 02/01/11 02/02/11 01/00/00 01/00/00 01/00/00 \$46.08 \$6.00 \$0.00 <td>Albertsons (So Cal)</td> <td></td> <td>Q1</td> <td>67200091</td> <td>EXCED</td> <td>RIN CAPLETS EXTRA STRENGTH</td> <td>100 CT</td> <td>24</td> <td>TPR</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>\$19.00</td> <td>\$0.00</td> <td>\$0.0</td>	Albertsons (So Cal)		Q1	67200091	EXCED	RIN CAPLETS EXTRA STRENGTH	100 CT	24	TPR							\$19.00	\$0.00	\$0.0
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A The Promotional Calendar has sorting options for each column. Sort by Customer Name, Item or Promotional Type, etc.

To sort a column, click the **column header** and select the desired options from the list.

Before you print the data for your client, you might want to hide a few of the columns, depending on what you want to discuss with the client. To hide a column, simply click on the top of the column to select it. Right click and select **Hide**.

To go back and unhide the columns, select the cells next to the hidden cell, right click and select **Unhide**.

Once you have your sheet setup, select **Print Preview**. After you have the proper print options selected, click **Print**.

Sorting and Printing the Budget Summary

Client:	Novartis					Division:		S	outhwes		
Region:	West		Plan Development Date:								
Albertsons (S	- (-1)										
Contractor Contractor Carl							Summar	y is Automatically Pop	oulated		
Select a Reta Total - All Ret			1		10 0	1 .					
Albertsons (S	o Cal)			Albertso	ns (So Ca						
Jewel Shaws				Total -	Novartis						
Acme Albertsons IM Albertsons LL		Sales	Difference (Actual to Plan)	Year to Date Sales	Year to Date Spend	Plan Spend	Actual Spend	Balance (Negative=Overspent)	Spending Rate %		
Other Retailer 8		\$720,000	\$70,000	\$0	\$0	\$0	\$0	\$0	0.0		
Retailer 9		95				8 c	22 1				
Retailer 10		\$0	A \$0	\$0	\$0	\$0	\$0	\$0	0.0		
Retailer 11		\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.0		
Retailer 12		\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.0		
Retailer 13					100,000		Contraction of Contraction	200000	300000		
Retailer 14		\$720,000	\$70,000	\$0	\$0	\$0	\$0	\$0	0.0		
Retailer 15											
Retailer 16 Retailer 17				Anal	gesics						
Retailer 17			Difference	Year to Date	Year to Date			Balance	Spending		
Retailer 19		Color.		CALLER FOR LOCAL STREET		Plan Cound	A.4				
Retailer 20	33	Sales	(Actual to Plan)	Sales	Spend	Plan Spend	Actual Spend	(Negative=Overspent)	Rate %		
10	\$200,000	\$225,000	\$25,000	\$0	\$0	\$0	\$0	\$0	0.0		
2Q	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.0		
3Q	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.0		
4Q	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.0		
Total	\$200,000	\$225,000	\$25,000	\$0	\$0	\$0	\$0	\$0	0.0		
				Ant	acids						
Period	Plan Sales	Actual Sales	Difference (Actual to Plan)	Year to Date Sales	Year to Date Spend	Plan Spend	Actual Spend	Balance (Negative=Overspent)	Spending Rate %		

A Your columns should be populated with data if you have entered your information on the BudgetSummaryInput tab.

B You can sort by Retailer including sorting by "All Retailers."

After selecting the retailer(s), select **Print Preview** and set your print options. After you have the proper print options selected, click **Print**.